COGNOS(R) Business Intelligence Series

USING COGNOS SERIES 7 AND COGNOS 8 IN THE SAME ENVIRONMENT

COGNOS®

THE NEXT LEVEL OF PERFORMANCE™

Product Information

This document applies to Cognos Series 7 Version 4 MR2 and Cognos 8 Version 8.3 and may also apply to subsequent releases. To check for newer versions of this document, visit the Cognos Global Customer Services Web site (http://support.cognos.com).

Copyright

Copyright (C) 2007 Cognos Incorporated.

Portions of Cognos(R) software products are protected by one or more of the following U.S. Patents: 6,609,123 B1; 6,611,838 B1; 6,662,188 B1; 6,728,697 B2; 6,741,982 B2; 6,763,520 B1; 6,768,995 B2; 6,782,378 B2; 6,847,973 B2; 6,907,428 B2; 6,853,375 B2; 6,986,135 B2; 6,995,768 B2; 7,062,479 B2; 7,072,822 B2; 7,111,007 B2; 7,130,822 B1; 7,155,398 B2; 7,171,425 B2; 7,185,016 B1; 7,213,199 B2.

Cognos and the Cognos logo are trademarks of Cognos Incorporated in the United States and/or other countries. All other names are trademarks or registered trademarks of their respective companies.

While every attempt has been made to ensure that the information in this document is accurate and complete, some typographical errors or technical inaccuracies may exist. Cognos does not accept responsibility for any kind of loss resulting from the use of information contained in this document.

This document shows the publication date. The information contained in this document is subject to change without notice. Any improvements or changes to either the product or the document will be documented in subsequent editions.

U.S. Government Restricted Rights. The software and accompanying materials are provided with Restricted Rights. Use, duplication, or disclosure by the Government is subject to the restrictions in subparagraph (C)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013, or subparagraphs (C) (1) and (2) of the Commercial Computer Software - Restricted Rights at 48CFR52.227-19, as applicable. The Contractor is Cognos Corporation, 15 Wayside Road, Burlington, MA 01803.

This software/documentation contains proprietary information of Cognos Incorporated. All rights are reserved. Reverse engineering of this software is prohibited. No part of this software/documentation may be copied, photocopied, reproduced, stored in a retrieval system, transmitted in any form or by any means, or translated into another language without the prior written consent of Cognos Incorporated.

Table of Contents

Introduction *5*

Chapter 1: The Role of Interoperability in the Migration Strategy *7*

Chapter 2: Set up Interoperability Between Cognos Series 7 and Cognos 8 BI *9*

- Configuring Cognos 8 to Use the Cognos Series 7 Namespace *9*
  - Configure a Cognos Series 7 Namespace *10*
  - Enable Secure Communication to the Directory Server Used by the Cognos Series 7 Namespace *10*
  - Enable Single Signon Between Cognos Series 7 and Cognos 8 *10*
  - Update the Cognos Series 7 Trusted Signon Plug-in *11*
- Using Cognos Connection as the Portal for Cognos Series 7 Reports *13*
  - Show the Upfront NewIndex in Cognos Connection *14*
  - Specify Cognos 8 as the Portal to Which Cognos Series 7 Reports are Published *15*
- Publish Cognos Series 7 Reports to Cognos ReportNet or Cognos 8 *18*
- Run or Open a Series 7 PowerPlay Report *19*
  - Change the Default Settings for a Cognos Series 7 PowerPlay Report *20*
  - Open a Cognos Series 7 Cube *20*
  - Change the Multilingual Properties for Cognos Series 7 Reports and Cubes *20*
- Working with Cognos Series 7 PowerPlay Reports and Cubes in Cognos Connection *21*
- Update a PowerCube Connection in Cognos 8 *22*
- Understanding Drill-through Concepts in Cognos 8 *22*
  - Drill-through Paths *22*
  - Drilling Through to Different Report Formats *23*
  - Bookmark References *23*
  - Members and Values *23*
  - Drilling Through on Dates Between PowerCubes and Relational Packages *25*
  - Drilling Through Between Packages *26*
- Set Up Drill-through Access in a Package *26*
  - Set Up a Drill-through Target in Analysis Studio *29*
  - Debugging a Drill-through Definition *29*
- Set Up Drill-through Access in a Report *31*
  - Specify the Drill-through Text *33*
  - Example - Create a Drill-through Report *34*
- Drilling Through from Cognos Series 7 to Cognos 8 *35*
  - Setting Up Drill-through Access from PowerPlay Web *35*
  - Setting Up Drill-through Access from Cognos Visualizer *36*
  - Create and Test the Target Report *36*

Chapter 3: Take Advantage of Cognos 8 Features *37*

- Architecture *37*
- Data Access *39*
- Managed Reporting *40*
- Exploration *41*
- Analysis *42*
- Feature Differences *42*
- User Experience *42*

Index *51*

Introduction

Cognos Series 7 is a popular product that is used by many thousands of organizations. Cognos is committed to supporting Cognos Series 7 for as long as are there is sufficient customers demand to justify ongoing development and support. However, the many advantages of Cognos 8, the next generation solution from Cognos, are creating a growing demand in organizations to move to that solution.

This document is intended for use when you want to use both Cognos Series 7 and Cognos 8 in the same environment. It provides a best practices approach for interoperability between an existing Cognos Series 7 environment and the new Cognos 8 solution, allowing you to leverage Cognos Series 7 investment while creating new content in Cognos 8. We recommend this mixed environment as the first step in the migration from Cognos Series 7 to Cognos 8.

The document applies to Cognos Series 7 MR2 and Cognos 8 version 8.3.

Audience

To use this document effectively, you should be familiar with Cognos Series 7 and Cognos 8 BI products, your information technology infrastructure, and the business needs of the people in your organization. We assume that you have completed a successful installation and configuration of your Cognos Series 7 and Cognos 8 products.

This document is for Project Planners, Managers, Business Intelligence Architects, or Administrators who are responsible for planning, assessing, and implementing a strategy for their organization to use both Cognos Series 7 and Cognos 8 in the same environment.

This document contains interoperability information that appears in other Cognos Series 7 and Cognos 8 documents. The information is collected into a single document to make it easier for you to understand and implement an environment in which Cognos Series 7 and Cognos 8 interoperate.

Related Documentation

Our documentation includes user guides, getting started guides, new features guides, readmes, and other materials to meet the needs of our varied audience. The following documents contain related information and may be referred to in this document.

Note: If you do not have access to any of the following documents, search the Documentation library of the Cognos Global Customer Services Web site (http://support.cognos.com). If you require logon credentials, consult your administrator or send an email to support.america@cognos.com.

Document	Description
Cognos 8 Installation and Configuration Guide	Installing, upgrading, configuring, and testing Cognos 8, changing application servers, and setting up samples
Cognos 8 Administration and Security Guide	Managing servers, security, reports, and portal services; setting up Cognos samples; troubleshooting; and customizing Cognos 8
Cognos 8 Cognos Connection User Guide	Using Cognos Connection to publish, find, manage, organize, and view Cognos content, such as scorecards, reports, analyses, and agents

Document	Description
Cognos Series 7 PowerPlay Enterprise Server Guide	Administering PowerPlay servers and deploying cubes and reports to PowerPlay users in Windows environments or on the Web
Cognos Series 7 PowerPlay Web User's Guide	Viewing, exploring, formatting, and distributing PowerPlay reports using a Web browser
Cognos Series 7 Web Portal User Guide	Viewing, finding, organizing, and sharing information in Upfront, the customizable interface used to publish Cognos reports to the Web
Planning a Migration from Cognos Series 7 to Cognos 8 BI	Planning a migration from Cognos Series 7 to Cognos 8 BI and understanding the migration options
Cognos 8 Migration Tools User Guide	Moving metadata and applications from Cognos Series 7 to Cognos 8
Cognos Series 7 Step-by-Step Transformer	Modeling and building PowerCubes using Model Definition Language (MDL) scripts

Finding Information

To find the most current product documentation, including all localized documentation, access the Cognos Global Customer Services Web site (http://support.cognos.com). Click the **Documentation** link to access documentation guides. Click the **Knowledge Base** link to access all documentation, technical papers, and multimedia materials.

Product documentation is also available in online help from the **Help** menu or button in Cognos products. You can also download documentation in PDF format from the Cognos Global Customer Services Web site.

You can also read PDF versions of the product readme files and installation guides directly from Cognos product CDs.

Getting Help

For more information about using Cognos products or for technical assistance, visit the Cognos Global Customer Services Web site (http://support.cognos.com). This site provides product information, services, user forums, and a knowledge base of documentation and multimedia materials. To create a case, contact a support person, or provide feedback, click the **Contact Us** link. For information about education and training, click the **Training** link.

Printing Copyright Materials

You can print selected pages, a section, or the whole book. Cognos grants you a non-exclusive, non-transferable license to use, copy, and reproduce the copyright materials, in printed or electronic format, solely for the purpose of operating, maintaining, and providing internal training on the Cognos software.

Chapter 1: The Role of Interoperability in the Migration Strategy

Cognos has developed migration recommendations for customers who are moving from Cognos Series 7 to Cognos 8. Interoperability, the use of both Cognos Series 7 and Cognos 8 in the same environment, is part of the recommended migration strategy. Interoperability enables you to slowly introduce parts of Cognos 8 BI to users. When migrating, most companies find that interoperability makes sense as an intermediate step.

The overall recommended migration approach involves the following:

- Build new applications in Cognos 8.

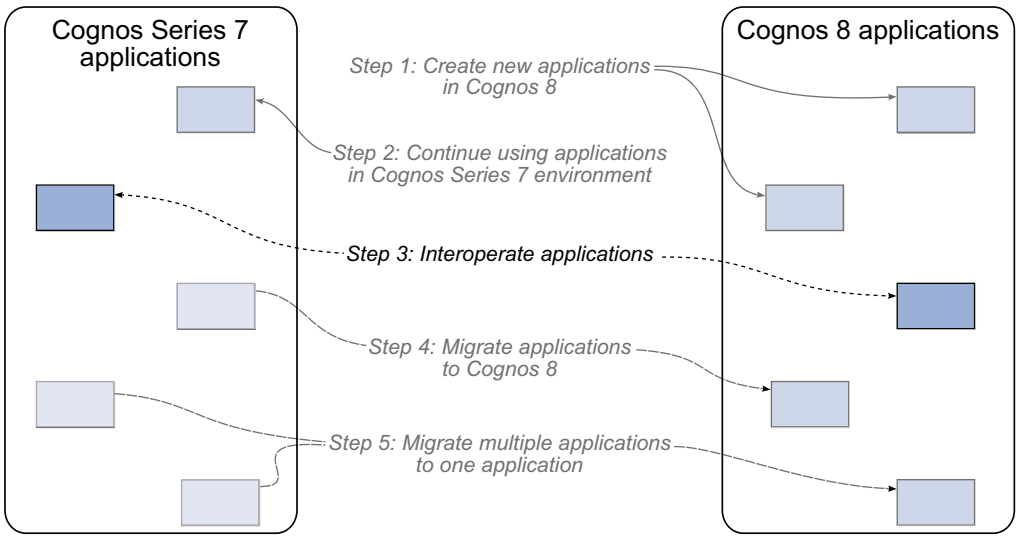
  Stop application development in Series 7 products. Create new applications in Cognos 8.
- Maintain existing Series 7 applications.

  If existing applications are working well, leave them in Series 7 until you have a business requirement to migrate.
- Set up Interoperability Between Cognos Series 7 and Cognos 8 BI

  Setting up interoperability involves additional configuration in Cognos Series7, Cognos 8, or both.
- Gradually migrate applications and move users to Cognos 8 BI.

  As the business need arises, migrate applications to Cognos 8 using lift and shift, compress and optimize, or a combination of both.

The following diagram shows the recommended approach to migration. It shows that applications that are migrated to Cognos 8 run natively in Cognos 8, and are no longer used in Cognos Series 7. When you set up interoperability, the applications can use both Cognos Series 7 and Cognos 8 BI, but are still Cognos Series 7 applications.


Cognos Series 7 applications
Cognos 8 applications
Step 1: Create new applications in Cognos 8
Step 2: Continue using applications in Cognos Series 7 environment
Step 3: Interoperate applications
Step 4: Migrate applications to Cognos 8
Step 5: Migrate multiple applications to one application

Running both products ensures that you have the applications and features you require in Cognos Series 7, as well as new applications that take advantage of the expanded Cognos 8 functionality. By gradually introducing users and moving key business applications to the new architecture, you minimize the risk and disruption to your business.

However, there is more overhead, including administration, maintenance, and hardware associated with having two, fully functional BI environments. It also may take longer to completely replace all currently deployed Cognos Series 7 applications with Cognos 8 BI applications.

Chapter 2: Set up Interoperability Between Cognos Series 7 and Cognos 8 BI

Set up interoperability before and during migration to provide continuity to your user communities and your business processes, exchange and re-use information, and extend the value of your existing Cognos Series 7 applications.

For example, the procurement department of GO Americas has Cognos 8 and Cognos Series 7 PowerPlay Web. They are looking for ways to extend Cognos Series 7 PowerPlay applications, quickly and easily.

We recommend that the department start by setting up interoperability between Cognos Series 7 and Cognos 8 BI. This enables them to start realizing the benefits of Cognos 8 without migrating.

Some interoperability options include:

- configuring Cognos Series 7 and Cognos 8 to use the same namespace and single signon (p. 9)
- using Cognos Connection as the portal for Cognos Series 7 content (p. 13)
- publishing Cognos Series 7 PowerPlay reports and cubes to Cognos Connection (p. 18)
- running Cognos Series 7 PowerPlay reports in Cognos Connection (p. 21)
- enabling drill-through between Cognos Series 7 PowerPlay and Cognos 8 reports (p. 22)

Configuring Cognos 8 to Use the Cognos Series 7 Namespace

To support interoperability, you must configure Cognos 8 components to use a Cognos Series 7 namespace as the authentication provider. Users will be authenticated based on the authentication and signon configuration of the Cognos Series 7 namespace.

If you want to configure a Cognos Series 7 namespace as your authentication source, you must install Cognos 8 Content Manager on a computer that supports Cognos Series 7. For an up-to-date list of the software environments supported by Cognos products, see the Cognos Global Customer Services Web site (http://support.cognos.com).

Note: You cannot use a Cognos Series 7 Local Authentication Export (LAE) file for authentication with Cognos 8 components.

You can configure Cognos 8 components to use multiple Cognos Series 7 authentication providers. We recommend that all Cognos Series 7 namespaces use the same primary Cognos Series 7 Ticket Server. Otherwise, you may receive errors or be prompted for authentication more than once.

If you change the configuration information stored in the directory server used for Cognos Series 7, you must restart the Cognos 8 service before the changes take effect in the Cognos 8 installation.

A user must be in at least one Access Manager user class to be able to log on to Cognos 8 components.

To use a Cognos Series 7 namespace and to set up single signon, do the following:

- ❑ "Configure a Cognos Series 7 Namespace" (p. 10)
- ❑ "Enable Secure Communication to the Directory Server Used by the Cognos Series 7 Namespace" (p. 10), if required
- ❑ "Enable Single Signon Between Cognos Series 7 and Cognos 8" (p. 10)
- ❑ "Update the Cognos Series 7 Trusted Signon Plug-in" (p. 11), if required

Configure a Cognos Series 7 Namespace

You can configure Cognos 8 to use one or more Cognos Series 7 namespaces for authentication.

Steps

1. On every computer where you installed Content Manager, open Cognos Configuration.
2. In the **Explorer** window, under **Security,** right-click **Authentication**, and then click **New resource**, **Namespace**.
3. In the **Name** box, type a name for your authentication namespace.
4. In the **Type** list, click the appropriate namespace and then click **OK**.

   The new authentication provider resource appears in the **Explorer** window, under the **Authentication** component.
5. In the **Properties** window, for the **Namespace ID** property, specify a unique identifier for the namespace.
6. Specify the values for all other required properties to ensure that Cognos 8 components can locate and use your existing authentication provider.

   If your Cognos Series 7 namespace version is 16.0, ensure that the **Data encoding** property is set to **UTF-8**. In addition, the computers where Content Manager is installed must use the same locale as the data in the Cognos Series 7 namespace.

   The host value can be a computer name or an IP address. If you are publishing from Cognos Series 7 PowerPlay Enterprise Server to Cognos 8, you must use the same value format that is used in Cognos Series 7 Configuration Manager for the location of the directory server. For example, if the computer name is used in Cognos Series 7 Configuration Manager, the computer name must also be used in Cognos Configuration for Cognos 8.
7. If your namespace environment includes version 15.2 of the Cognos Series 7 namespace, you must disable the **Series7NamespacesAreUnicode** setting.
   - In the **Properties** window, in the **Advanced Properties** value, click the edit button.
   - In the **Value - Advanced properties** window, click **Add**.
   - In the **Name** box, type **Series7NamespacesAreUnicode**.
   - In the **Value** box, type **False**, and then click **OK**.
8. In the **Properties** window, under **Cookie settings**, ensure that the **Path**, **Domain**, and **Secure flag enabled** properties match the settings configured for Cognos Series 7.
9. From the **File** menu, click **Save**.
10. Test the connection to a new namespace. In the **Explorer** window, under **Authentication**, right-click the new authentication resource and click **Test**.

Enable Secure Communication to the Directory Server Used by the Cognos Series 7 Namespace

If you are using an SSL connection to the Directory Server used by the Cognos Series 7 namespace, you must copy the certificate from the Directory Server to each Content Manager computer.

For more information, see the Cognos Series 7 Access Manager *Administrator Guide* and the documentation for your Directory Server.

Enable Single Signon Between Cognos Series 7 and Cognos 8

Single signon ensures that users who are logged on to one Cognos application are not prompted for authentication when they run another Cognos application.

You can ensure that your users benefit from single signon by ensuring that both Cognos 8 and Cognos Series 7 PowerPlay use the same Cognos Series 7 namespace as their authentication source. Alternatively, you can ensure that the authentication namespaces used for both Cognos 8 and Cognos Series 7 PowerPlay are configured to use an external single signon mechanism for authentication, such as operating system signons for Cognos Series 7 PowerPlay or LDAP provider with External Identity Mapping in Cognos ReportNet®.

If your Cognos Series 7 namespace is configured for integration with your external authentication mechanisms for single signon, the Cognos Series 7 provider automatically uses this configuration.

Steps

1. Ensure that you configured Cognos 8 components to use a Cognos Series 7 namespace as an authentication provider (p. 9).
2. For Cognos Series 7, start Configuration Manager.
3. Click **Open the current configuration**.
4. On the **Components** tab, in the **Explorer** window, expand **Services**, **Access Manager - Runtime** and click **Cookie Settings**.
5. In the **Properties** window, ensure that the **Path**, **Domain**, and **Secure Flag Enabled** properties match the settings configured for Cognos 8.
6. Save and close Configuration Manager.
7. If the Cognos Series 7 namespace uses the Trusted Signon plug-in for single signon, you must now define the SaferAPIGetTrustedSignonWithEnv function (p. 11).

You can now add Cognos Upfront Series 7 NewsBoxes to your Cognos Connection portal pages.

Update the Cognos Series 7 Trusted Signon Plug-in

If the Cognos Series 7 namespace uses the Trusted Signon plug-in for single signon, you must define the SaferAPIGetTrustedSignonWithEnv function in your plug-in. Then you must recompile and redeploy the library for single signon to be achieved between Cognos 8 components and your authentication mechanism.

The SaferAPIGetTrustedSignonWithEnv function is an updated version of the SaferAPIGetTrustedSignon function. This update is required because Cognos 8 logon is not performed at the Web server as is the case for Cognos Series 7 applications. Therefore, it is not possible for the plug-in to perform a getenv() API call to retrieve Web server environment variables. The plug-in can request that specific environment variables be removed from the Web server using the SaferAPIGetTrustedSignonWithEnv function.

If you are running both Cognos Series 7 and Cognos 8 products using the same plug-in, both the SaferAPIGetTrustedSignonWithEnv and SaferAPIGetTrustedSignon functions are required. For information about the SaferAPIGetTrustedSignon function, see the Cognos Series 7 Access Manager *Trusted Services Plug-in SDK Guide*.

SaferAPIGetTrustedSignonWithEnv Function

For users to be successfully authenticated by Access Manager, OS signons must exist and be enabled in the current namespace.

The memory for the returned trustedSignonName and trustedDomainName is allocated internally in this API. If the function returns SAFER_SUCCESS, Access Manager calls SaferAPIFreeTrustedSignon to free the memory allocated.

The memory for the returned reqEnvVarList is allocated internally in this API. If the function returns SAFER_INFO_REQUIRED, Access Manager calls SaferAPIFreeBuffer() to free the memory allocated.

Both functions, SaferAPIGetTrustedSignon and SaferAPIFreeBuffer must be implemented to successfully register the library when SaferAPIGetTrustedSignonWithEnv is implemented. The function SaferAPIGetError is required only if you want specific error messages returned from your plug-in.

Syntax

SaferAPIGetTrustedSignonWithEnv

EnvVar	envVar[],	/*[IN]*/
char	**reqEnvVarList,	/*[OUT]*/
void	**trustedSignonName,	/*[OUT]*/
unsigned long	*trustedSignonNameLength,	/*[OUT]*/
void	**trustedDomainName,	/*[OUT]*/
unsigned long	*trustedDomainNameLength,	/*[OUT]*/
SAFER_USER_TYPE	*userType,	/*[OUT]*/
void	**implementerData);	/*[IN/OUT]*/

Parameter	Description
[in] envVar	An array of environment variable names and values that were retrieved from the Web server. The end of the array is represented by an entry with a null envVarName and a null envVarValue. Note that the first time this API is called, the envVar array contains only the end of array marker.
[in] reqEnvVarList	A string that contains a comma separated list of environment variable names that are requested by the Safer implementation. The end of the list must be null-terminated.
[out] trustedSignonName	A sequence of bytes that identifies the currently authenticated user. This value does not need to be null-terminated. This value is mandatory.
[out] trustedSignonNameLength	An integer value that indicates the length of the trustedSignonName. This length should exclude the null terminator, if there is one. This value is mandatory.
[out] trustedDomainName	A sequence of bytes that identifies the domain of the currently authenticated user. This value does not need to be null-terminated. If there is no trustedDomainName, the return is null. This value is optional.
[out] trustedDomainNameLength	An integer value that indicates the length of the trustedDomainName. This length should exclude the null terminator, if there is one. This value is mandatory and must be set to zero if there is no trustedDomainName.

Parameter	Description
[out] userType	A value that indicates the type of user that Access Manager will authenticate. This value is mandatory. The following return values are required for users to be successfully authenticated by Access Manager: • SAFER_NORMAL_USER A named user. OS signons must exist and be enabled in the current namespace. • SAFER_GUEST_USER A guest user. A guest user account must exist and be enabled in the current namespace. • SAFER_ANONYMOUS_USER An anonymous user. An anonymous user account must exist and be enabled in the current namespace.
[in/out] implementerData	A pointer used to preserve implementation-specific data between invocations. An invocation occurs every time Access Manager calls the trusted signon plug-in. This value is valid only if the trusted signon plug-in was invoked and you set a value for it.

Using Cognos Connection as the Portal for Cognos Series 7 Reports

If your administrator configures Cognos 8 to use the Cognos Series 7 namespace, you can see Cognos Series 7 entries in Cognos Connection. When you run a Cognos Series 7 report, the report runs in the Cognos Series 7 application used to create it.

There are two interoperability options for showing Cognos Series 7 content in Cognos Connection:

Configure Cognos 8 to show the contents of the Cognos Series 7 NewsIndex at the bottom of the page in Public Folders. The contents of your Cognos Series 7 personal NewsBox appears at the bottom of the page in My Folders.

Configure Cognos Series 7 PowerPlay 7.3 to use Cognos Connection rather than Upfront as a portal. If Cognos Series 7 users use Upfront to access content from other Cognos applications or versions previous to Cognos Series 7 PowerPlay 7.3, the administrator may still depend on the Upfront portal.

When you access Cognos Series 7 entries from Cognos Connection, consider the following things:

- If the Cognos Series 7 namespace and the Cognos 8 namespace are different, you must log on to both. Otherwise, you cannot see content in both areas.
- If you log off when you are in Upfront, you can no longer access Cognos Series 7 entries in Cognos Connection. You should always log off in Cognos Connection.
- If you belong to several Cognos Series 7 user classes, you are unable to select a different user class when you access Upfront through Cognos Connection.
- If you use an Upfront theme other than standard70, an error message may appear when you click the **More** link in the **Actions** column. You cannot access Cognos Series 7 entries.
- If you want to cut, copy, and paste Cognos Series 7 entries, use the More link in the **Actions** column, and then use the Upfront toolbar.
- If you perform a search in Cognos Connection, the Cognos Series 7 entries are not included in the search.
- You cannot combine Cognos 8 entries and Cognos Series 7 entries in a single folder or NewsBox.

For information about working with Cognos Series 7 entries in Upfront, see the Cognos Series 7 *Web Portal User Guide*.

How Are Cognos Series 7 PowerPlay Reports and Cubes Different from Other Cognos 8 Content?

Cognos Series 7 PowerPlay reports and cubes in Cognos Connection function differently from other Cognos 8 reports. The following actions do not apply to Cognos Series 7 PowerPlay reports and cubes:

- viewing the run history and report output versions
- specifying how long to keep report outputs and histories
- canceling and suspending reports
- specifying prompt values for report formats other than PDF
- specifying a language for the content of reports
- running a report as the owner
- scheduling reports
- distributing reports

Show the Upfront NewIndex in Cognos Connection

If Cognos 8 is configured properly to use the Cognos Series 7 namespace, you can allow users to access NewsIndexes and NewsBoxes of the Cognos Series 7 version of Cognos Upfront from Cognos Connection.

We recommend that Cognos Connection and Upfront use the same Web server if Upfront is set up to use relative URLs. If Cognos Connection and Upfront use different Web servers, configure Cognos Series 7 to use a fully qualified URL. This allows users to use the Web browser back button to navigate from Upfront back to Cognos Connection.

Steps

1. In Cognos Configuration, configure Cognos 8 to use your Cognos Series 7 namespace. For more information, see the *Installation and Configuration Guide*.
2. In the **Properties** window, under **Cookie Settings**, ensure that the **Secure Flag Enabled** property is set to **false**.
3. From the **File** menu, click **Save** and close Cognos Configuration.
4. Ensure that the ticket server for Cognos Series 7 namespace is running.
5. Ensure that the timeout value of the Cognos Series 7 ticket server is set to the same value or to a higher value than the Cognos 8 passport timeout value.
6. On the computer where Cognos 8 is installed, open the *c8_location*/templates/ps/portal/system.xml file in an XML editor.

   Ensure that your XML editor supports saving files in UTF-8 format.
7. Find and edit the **series7** parameter as follows:

```
<!-- Series 7 Integration parameters -->
<param name="series7">
  <enabled>true</enabled>
  <!-- character encoding used by series7 -->
  <encoding>series7_character_encoding</encoding>
  <!-- host and port to connect to Upfront server -->
  <host>Upfront_host_name</host>
  <port>Upfront_dispatcher_port_number</port>
  <!-- Upfront gateway location -->
  <gateway>Upfront_gateway_location</gateway>
  <!-- If required, specify the prefix for Cognos 8 back URLs when linking
to Series 7 content. (eg. http://Cognos8_computer) otherwise relative URL's
will be used -->
  <back-prefix>http://Series 7_server</back-prefix>
</param>
```

To view the character encoding used by Cognos Series 7, in Cognos Series 7 Configuration Manager, on the **Properties** tab, click **Cognos Shared**, click **Locale**, and then click the **Encoding** property.

8. Save the system.xml file in UTF-8 format.
9. Using Cognos Configuration, stop and then restart Cognos 8.

   For more information about stopping Cognos 8, see the *Installation and Configuration Guide*.

Specify Cognos 8 as the Portal to Which Cognos Series 7 Reports are Published

By default Cognos Series 7 PowerPlay is configured to use the Cognos Series 7 portal, Upfront, as the target for published reports. You can change the configuration to specify that reports published from PowerPlay Enterprise Server Administration or PowerPlay Web are saved to Cognos Connection.

After you configure PowerPlay to use Cognos Connection as the portal, you can use a command-line tool to move cube and report NewsItems from Upfront to Cognos ReportNet or Cognos 8 (p. 15).

Steps

1. In PowerPlay Enterprise Server Administration, select a server.
2. From the **Edit** menu, click **Properties**, and then click the **Settings** tab.
3. To use Cognos Connection as the portal, do the following:
   - In the **Default Portal** box (**Publishing**), click **Cognos ReportNet/Cognos 8**.
   - In the **Cognos ReportNet/Cognos 8 Gateway URI** box (**Publishing**), type the ReportNet or Cognos 8 external dispatcher URI. For more information, see the Cognos ReportNet or Cognos 8 *Installation and Configuration Guide*.
   - In the **Cognos ReportNet/Cognos 8 Dispatcher URI** box (**Publishing**), type the ReportNet or Cognos 8 dispatcher URI. For more information, see the Cognos ReportNet or Cognos 8 *Installation and Configuration Guide*.
   - Specify whether published PowerPlay reports are deleted from the ReportNet or Cognos 8 server when they are deleted from the PowerPlay Enterprise Server. To specify that these reports are deleted, in the **Delete related Cognos ReportNet/Cognos 8 objects when deleting local cubes** box (**Publishing**), click **Enabled**.
4. Click **OK**.

When you select **Publish to Portal** in PowerPlay Enterprise Server, or **Save As** in PowerPlay Web, content is published to Cognos Connection instead of Upfront.

Move Cube and Report NewsItems from Upfront to Cognos ReportNet or Cognos 8

You can use a command-line tool to move cube and report NewsItems from Upfront to Cognos ReportNet or Cognos 8. This tool saves time by allowing you to reuse existing Upfront NewsItems instead of republishing or recreating the content for use in Cognos ReportNet or Cognos 8.

The tool moves all cube and report NewsItems that you have access to. You cannot specify which items to move. If you want to make only some of the Upfront content available to Cognos ReportNet or Cognos 8 users, it may be easier to republish or recreate the content.

The command-line tool included with Cognos Series 7 PowerPlay Enterprise Server works with Cognos ReportNet 1.1 MR1 and subsequent releases, and Cognos 8. Before you begin, ensure that Cognos ReportNet or Cognos 8 is installed, configured, and started.

Steps

1. Configure Cognos Series 7 PowerPlay Enterprise Server to specify Cognos ReportNet or Cognos 8 as the portal to which reports are published.

   For more information, see the Cognos Series 7 PowerPlay *Enterprise Server Guide*.

2. Ensure that the credentials you use to log on to Cognos Series 7 PowerPlay Enterprise Server have read access to the Upfront NewsItems, and create and update permissions in Cognos ReportNet or Cognos 8.
3. Ensure that NewsBoxes and NewsItems at the same level in Upfront use unique names.
4. In a command prompt window on the computer where Cognos Series 7 is installed, go to the *installation_location*\bin directory.
5. Run the command-line tool to move the objects:
   - On Windows, the command format is

     `ppserver -tocrn -un username [-pw password] [-replace]`
   - On UNIX, the command format is

     `upgrade_tocrn -un username [-pw password] [-replace]`

   The following table describes the parameters you use with the `ppserver -tocrn` command. Note that all parameters are case sensitive.

Parameter	Description
`-un username`	Specifies a user who has read access to the Upfront NewsItems and rights to publish to Cognos ReportNet or Cognos 8.
`-pw password`	Specifies the user password. If no password is specified, it is assumed that a password is not required.
`-replace`	Specifies that existing PowerPlay objects in Cognos ReportNet or Cognos 8 are replaced when a name conflict occurs.

6. When the move process is complete, check the ppmigration.log file to ensure that the process was successful. Correct reported errors.

   The log file is created in *installation_location*\cer*n*\bin
7. Finally, open Cognos Connection and test the content.

Note: If you add or change any Cognos Series 7 PowerPlay NewsItems in Upfront, you can run the tool again to update the Cognos ReportNet or Cognos 8 content.

Differences Between Cognos Series 7 and Cognos ReportNet or Cognos 8

Because of differences between the two products, some functionality is not fully transferred during the move process. Wherever possible, Cognos Series 7 features are mapped to similar functionality in Cognos ReportNet or Cognos 8.

The following information will help you understand the move process, and identify additional work that may be required either before or after you run the command-line tool.

Subject or Feature	Cognos Series 7	Cognos ReportNet and Cognos 8
Organization of content in the portal	The root level in Upfront, the NewsIndex, can contain both NewsBoxes and NewsItems. Similar to a folder structure, there may be several levels of NewsBoxes. A PowerCube or report NewsItem can appear in the NewsIndex or a NewsBox.	The root level in Cognos Connection contains only folders. Reports or other types of links cannot appear at the root level. If PowerCube or report NewsItems appear in the Upfront NewsIndex, the move process creates a new folder in Cognos Connection named **Additional Upfront NewsItems** to contain these items.

Subject or Feature	Cognos Series 7	Cognos ReportNet and Cognos 8
NewsBox names	Upfront supports duplicate NewsBox names at the same level.	Cognos Connection does not support duplicate folder names at the same level. When moving NewsBoxes from the same level with duplicate names, only one Cognos Connection folder is created. To avoid errors, ensure that all NewsBoxes at the same level have unique names. If there are no conflicts related to duplicate NewsBox names, the NewsItems are moved to Cognos ReportNet or Cognos 8 with full functionality.
NewsItem names	Upfront supports duplicate NewsItem names in the same NewsBox.	Cognos Connection does not support duplicate cube, report, or link names in the same folder. When moving NewsItems from the same level with duplicate names, only one item is moved. Other items with duplicate names are not moved and are reported as errors in the log file. To avoid errors, ensure that all NewsItems at the same level have unique names. If there are no conflicts related to duplicate NewsItem names, the cube or report NewsItem is moved to Cognos ReportNet or Cognos 8 with full functionality.
Report links	Upfront supports Cognos Series 7 PowerPlay report link NewsItems.	Report links are not supported in Cognos ReportNet or Cognos 8. The source report is moved instead. To avoid errors, ensure that the target of a report link does not create a naming conflict when moving the content. If there are no conflicts related to duplicate NewsBox or NewsItem names, the source report is moved to Cognos ReportNet or Cognos 8 with full functionality.
Security	Upfront supports Access Control Lists (ACLs).	The Upfront ACL information is not moved to Cognos ReportNet or Cognos 8. By default, access to the moved content is not restricted. You must set permissions on all objects in Cognos Connection.

Publish Cognos Series 7 Reports to Cognos ReportNet or Cognos 8

You can publish Cognos Series 7 cubes and reports to Cognos Connection, the portal to Cognos ReportNet or Cognos 8, to provide Cognos ReportNet and Cognos 8 users with single-click access to data in Cognos Series 7 PowerPlay Web. If you publish a folder, all the cubes and reports in the folder are published to a Cognos Connection folder.

The Cognos Connection folder to be published to is a folder object property and must be set before attempting to publish. Cognos 8 must be configured to use the Cognos Series 7 namespace before attempting to publish (p. 9). Also, the Default Portal property in Cognos Series 7 PowerPlay Enterprise Server Administration must be set to Cognos ReportNet or Cognos 8 (p. 13).

If these are not set, then the Publish to Portal option is unavailable.

You cannot publish PowerPlay Portable Report files (.ppx) that have local cube references. PowerPlay Portable Report files are published from PowerPlay client applications and can be added to the PowerPlay Enterprise Server. You can update all .ppx files that have local cube references to have remote cube references instead. For more information, see the Cognos Series 7 *PowerPlay Enterprise Server Guide*.

Steps

1. In Cognos Series 7 PowerPlay Enterprise Server Administration, select a cube, report, or folder.

   Note: Do not publish content located in the imported_reports folder.

2. From the **Tools** menu, click **Publish to Portal**.

   The cube or report is published to the folder specified in the **Cognos ReportNet/Cognos 8 Folder for Cubes or Cognos ReportNet/Cognos 8 Folder for Reports** properties. This setting is made at the folder level.

Notes

- Cubes published from Cognos Series 7 PowerPlay Enterprise Server Administration become linked items in Cognos Connection. References to the published reports are added to the Cognos ReportNet or Cognos 8 server. The references can be deleted by a Cognos ReportNet or Cognos 8 administrator, but the objects remain in PowerPlay Enterprise Server Administration.
- If you publish a folder to Cognos Connection, only the cubes and reports contained in that folder appear in Cognos Connection. The folder will not appear in Cognos Connection. A folder hierarchy that you created in PowerPlay Enterprise Server Administration is not maintained when you publish the folder to Cognos Connection.
- In a multiple server environment, if a report or a cube is to be published, you must ensure that the report or cube resides in a folder mapped to a shared drive using the **Mount At** option. For more information, see the *PowerPlay Enterprise Server Guide*.
- To publish to Cognos ReportNet or Cognos 8, the same Cognos Series 7 namespace must be used by both Cognos Series 7 PowerPlay Enterprise Server and Cognos ReportNet or Cognos 8 (p. 9).

Maintaining Properties When Saving Reports to Cognos ReportNet or Cognos 8

When you publish a report to Cognos Connection, report information is not stored in an **imported_reports** folder on the Cognos Series 7 PowerPlay Enterprise Server, as it is when a report is published to Upfront. A .ppx file is still created, but is stored instead by Content Manager, the Cognos ReportNet and Cognos 8 service that manages the storage of reporting applications.

If you publish a report from PowerPlay Enterprise Server Administration, the original report path is saved to Cognos ReportNet or Cognos 8. When the published report is run, the properties are determined by the original report's .cfx file. If that original report is no longer available, it will default to use the cube's CFX settings.

If you save a report from Cognos Series 7 PowerPlay Web, the properties are determined by the report settings of the folder that contains the cube used by the published report. If the cube is not in a folder, then the root level report setting is used.

Maintaining PowerPlay Objects on Cognos ReportNet or Cognos 8

If you are maintaining Cognos Series 7 PowerPlay objects on a Cognos ReportNet or Cognos 8 server, you may want to do the following.

- Save objects from Cognos Series 7 PowerPlay Web to Cognos ReportNet or Cognos 8 that were previously published to Upfront. For information about publishing reports from Cognos Series 7 PowerPlay Web, see the PowerPlay Web *User's Guide*.
- Run the CRN REPLACE CUBENAME and CRN REPLACE GATEWAY commands to migrate Cognos ReportNet or Cognos 8 objects to a different Cognos Series 7 PowerPlay server, or after a PowerPlay server's gateway has changed. For more information, see the *PowerPlay Enterprise Server Guide*.

Run or Open a Series 7 PowerPlay Report

You can run Cognos Series 7 PowerPlay reports in the following formats:

- If the HTML icon is visible, the report opens in Cognos Series 7 PowerPlay Web Explorer.
- If the PDF icon is visible, the report runs in the Cognos Series 7 PowerPlay Web Viewer.

Cognos Series 7 PowerPlay administrators can restrict who can open cubes. For information about publishing Cognos Series 7 PowerPlay reports and cubes in Cognos 8, see the Cognos Series 7 PowerPlay *Enterprise Server Guide*.

If you use secured Cognos Series 7 cubes, the namespace against which the cubes are secured must be configured as an authentication source in Cognos 8. This namespace need not be the only authentication namespace or the primary logon for the user. For more information about configuring authentication namespaces see the Cognos 8 *Installation and Configuration Guide*.

Before you can run or open Cognos Series 7 PowerPlay reports and cubes directly from Cognos 8, you must have both Cognos Series 7 PowerPlay 7.3 and Cognos 8 installed and configured. You also must have the following permissions:

- execute and read permissions to run or open a report or cube
- read and traverse permissions to access the folder that contains the report or cube
- read and write permissions to set properties for cubes and reports

Step

- In Cognos Connection, click the report that you want.

Depending on the default action for the report, the report runs in either PDF format (default) or opens with Cognos Series 7 PowerPlay Web Explorer.

If you have the required permissions, you can change the run options for Cognos Series 7 PowerPlay reports and cubes. For information about using Cognos Series 7 PowerPlay Web Explorer and PowerPlay Web Viewer, see the Cognos Series 7 PowerPlay Web *User's Guide*.

Tip: To run any Cognos Series 7 PowerPlay report in Cognos Series 7 PowerPlay Web Explorer, click the open with PowerPlay Explorer button in the actions toolbar. You can also click **More** next to the report you want and then open the report in Analysis Studio or Report Studio. The migration tools must already be installed. For information about installing these tools, see the Cognos 8 Migration Tools *Installation Guide*. When you open the report, it is upgraded to the format of the studio that you opened it in. If you save the report, it is saved in the upgraded format. There may be differences between the original PowerPlay report and the Cognos 8 version of the report. If you do not save the report, it remains a Cognos Series 7 PowerPlay report. For more information about upgrading Cognos Series 7 PowerPlay reports, see the Cognos 8 Migration *User Guide*.

Change the Default Settings for a Cognos Series 7 PowerPlay Report

You can change the defaults for Cognos Series 7 PowerPlay reports. You can select one of the following default actions when a report is run:

- run the report in PDF format (default)
- open the report with PowerPlay Web Explorer

For HTML format reports, you can choose to open the report in design mode (without data). Opening a report in design mode is useful to quickly view the structure of the report.

For PDF format reports, you can choose to be prompted for values that filter the range of data included in a report. For example, you can specify a date range that is a subset of the dates available in the report. If the Cognos Series 7 PowerPlay report was created with prompt values, you are prompted to enter values when the report runs.

Steps

1. In Cognos Connection, click the set properties button on the actions toolbar to the right of the report you want to run.
2. Click the **PowerPlay report** tab.
3. Under **Default action**, select the default action for when the report is run.
4. For HTML reports, if you want to open the report without data, design mode, select the **Open in design mode** check box.

Tip: You can also click the open with PowerPlay Web Explorer in design mode button if it appears in the actions toolbar.

5. For PDF reports, if you want to be prompted for values, select the **Prompt for values** check box.

Tip: The **Prompt for values** check box appears only if prompt values are created for the report. You can also click More next to the report you want and then click the run the report in PDF format and prompt for values button.

Open a Cognos Series 7 Cube

You can open Cognos Series 7 cubes and work with them in Cognos Series 7 PowerPlay Web Explorer.

For more information about using Cognos Series 7 PowerPlay Web Explorer, see PowerPlay Web *User's Guide*.

Step

- In Cognos Connection, click the cube that you want.

Change the Multilingual Properties for Cognos Series 7 Reports and Cubes

In Cognos Connection, you can select the multilingual properties of a Cognos Series 7 report or cube. The name, screen tip, and description use the language that you select.

The content, data, category labels, and other labels do not change. The language for these items is set by the Cognos Series 7 PowerPlay administrator who creates the report or cube.

Steps

1. In Cognos Connection, click the set properties button next to the entry you want to change.
2. Click the **General** tab.
3. Under **Language**, select a language from the list.

   Languages that already have multilingual properties defined appear at the top of the list above a separator line.
4. If you want, type a description in the **Name**, **Description**, and **Screen tip** box.

   The name appears in the list of portal entries. The description appears when you set your preferences to use the details view. The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.

Tip: To remove multilingual properties for a language, select the language in the list and click **Remove values for this language**.

5. Click **OK**.

Working with Cognos Series 7 PowerPlay Reports and Cubes in Cognos Connection

After Cognos Series 7 PowerPlay reports and cubes are published to the Cognos 8 portal, you can use PowerPlay authoring tools to run, create, and edit Cognos Series 7 PowerPlay reports.

Depending on the default action for the report, a Cognos Series 7 PowerPlay report opens in either PowerPlay Web Viewer or PowerPlay Web Explorer:

- If the PDF icon is visible, the report runs in the PowerPlay Web Viewer.

  In PowerPlay Web Viewer, you can choose to open the report in PowerPlay Web Explorer for further exploration or to create a new report.

- If the HTML icon is visible, the report opens in PowerPlay Web Explorer.

You can also click **More** next to the report you want and then open the report in Analysis Studio or Report Studio. To access these options, the migration utilities must already be installed. For information about installing these utilities, see the Cognos 8 Migration Tools *Installation Guide*. When you open the report, it is upgraded to the format of the studio that you opened it in. If you save the report, it is saved in the upgraded format. There may be differences between the original Cognos Series 7 PowerPlay report and the Cognos 8 version of the report. If you do not save the report, it remains a Cognos Series 7 PowerPlay report. For more information about upgrading Cognos Series 7 PowerPlay reports, see the Cognos 8 Migration *User Guide*.

Cubes open in PowerPlay Web Explorer.

For information about using Cognos Series 7 PowerPlay Web Explorer and PowerPlay Web Viewer, see the PowerPlay Web *User's Guide*.

Cognos Series 7 PowerPlay reports and cubes function differently from other reports. The following Cognos 8 actions do not apply to Cognos Series 7 PowerPlay reports and cubes:

- viewing the run history and report output versions
- specifying how long to keep report outputs and histories
- canceling and suspending reports
- specifying prompt values for report formats other than PDF
- specifying language for the content of reports
- running a report as the owner
- scheduling reports
- distributing reports

Configuration Tasks

Configuration considerations for Cognos Series 7 PowerPlay reports and cubes published to Cognos Connection include the following:

❑ If you use secured Cognos Series 7 cubes, the namespace against which the cubes are secured must be configured as an authentication source in Cognos 8. This namespace need not be the only authentication namespace or the primary logon for the user. For more information about configuring authentication namespaces see the Cognos 8 *Installation and Configuration Guide*.

❑ Ensure that users have the required permissions:

- execute and read permissions to run or open a report or cube
- read and traverse permissions to access the folder that contains the report or cube
- read and write permissions to set properties for cubes and reports

❑ Change the default settings for Cognos Series 7 PowerPlay reports.

You can select one of the following default actions when a report is run:

- run the report in PDF format (default)

  For PDF format reports, you can choose to be prompted for values that filter the range of data included in a report. For example, you can specify a date range that is a subset of the dates available in the report. If the Cognos Series 7 PowerPlay report was created with prompt values, you are prompted to enter values when the report runs.
- open the report with PowerPlay Web Explorer

  For HTML format reports, you can choose to open the report in design mode (without data). Opening a report in design mode is useful to quickly view the structure of the report.

  For more information, see the Cognos Connection

❑ Change the multilingual properties of a Cognos Series 7 report or cube.

The name, screen tip, and description uses the language that you select.The content, data, category labels, and other labels do not change. The language for these items is set by the PowerPlay administrator who creates the report or cube.

Update a PowerCube Connection in Cognos 8

If a Cognos Series 7 PowerCube name or location changes, such as when a timestamp is used in the cube name when the cube is rebuilt, you can update the connection information without affecting current users. To do this, you must first update the connection information to the rebuilt PowerCube, and then refresh the report servers to use the rebuilt PowerCube for new connections.

The updated Cognos Series 7 PowerCube will be used for all new sessions referencing that data source. Any user that has an active session against the data source may have to re-open their session. Old PowerCubes can be removed only after all sessions using that PowerCube have ended.

When you rebuild the cube, we recommend that you use a new name for the PowerCube, for example by including the current date in the new name. You can then store the rebuilt PowerCube in the same location as the old PowerCube.

Tip: You can automate this task using the Cognos 8 SDK to hot swap PowerCubes. For more information, see the Cognos 8 SDK Developer Guide. You can also use the sample script cubeswap.bat or cubeswap.sh that is located in the c8_location/webapps/utilities/cubeSwap directory. You can get more information about the script syntax by running the script without any parameters.

For more information about updating a PowerCube connection, see the Cognos 8 *Administration and Security Guide*.

Understanding Drill-through Concepts in Cognos 8

Before you set up drill-through access, you must understand the key concepts about drilling through. Knowing these concepts will help you to avoid errors so that report consumers drill through as efficiently as possible.

The target of drill-through access is always a saved report definition. The report can be created in Report Studio, Query Studio, or Analysis Studio.

Drill-through Paths

You can create a drill-through path in a source report in Report Studio, or using **Drill-through Definitions** in Cognos Connection. A drill-through path is the definition of the path that is taken when moving from one report to another, including how the data values are passed between the reports.

Using **Drill-through Definitions**, you can create a drill-through path from any report in the source package to any target report in any other package in Cognos Connection. This type of drill-through definition is stored in the source package and can be used when you want to drill between any combination of Analysis Studio, Query Studio, or Cognos Viewer reports in any package.

For any target report that contains parameters, the target parameters must be mapped to the correct metadata in the drill-through path. This ensures that the values from the source report are passed to the correct parameter values, and that the target report is filtered correctly.

A report-based drill-through path refers to a path created and stored in a Report Studio source report. The path is associated with a specific data column, chart, or cross tab, and is available only when users select that area of the report. The drill-through definition, if it exists, appears as a hyperlink in the source report when it is run.

The report-based drill-through is limited to Report Studio source reports and any target reports. This type of drill-through can be used when you want to pass the data item values or parameter results within a source report to the target report, the results of a report expression to a target report, or a URL link as a part of the drill-through definition.

Drilling Through to Different Report Formats

The settings in the drill-through definition determine how users see the report results. For example, the users may see the reports in Cognos Viewer as an HTML Web page, or the reports may open in Query Studio or Analysis Studio.

Reports can be output as HTML Web pages, as PDF, XML, CSV, or Excel formats. When you define a drill-through path, you can choose the output format. This can be useful if the expected use of the target report is something other than online viewing. If the report will be printed, choose PDF; if it will be exported to Excel for further processing, choose Excel or CSV, and so on.

If you define a drill-through path to a report that is created in Analysis Studio or Query Studio, the report can be run and opened in its studio instead of in Cognos Viewer. This can be useful if you expect a consumer to use the drill-through target report as the start of an analysis or query session to find more information.

An example of a this type of drill-through action can be an application where a dashboard style report of high-level data can be drilled through to Analysis Studio to investigate items of interest. The Analysis Studio view can then be drilled through to a PDF report for printing.

Note: Drilling through to Report Studio is not supported for the Express Authoring Mode. The Report Studio Professional Mode does not display data results.

Bookmark References

When you drill through, the values that you pass are usually, but not always, used to filter the report using parameters. Cognos 8 Business Intelligence supports bookmarks within saved PDF reports so that a user can scroll a report to view the relevant part based on a URL parameter. For example, you may define a report with one page per product and add a bookmark of the product number on each page. Report consumers can then select a bookmark to see the product that they want.

When a bookmark in the source report is used in a drill-through definition, it provides the value for the URL parameter. When report consumers drill through using this definition, they see the relevant section of the target report.

Bookmark references are limited to previously run reports that are generated as PDF and contain bookmark objects.

Members and Values

Dimensionally modeled data, whether stored in cubes or stored as Dimensionally Modeled Relational (DMR) data, organizes data into dimensions. These dimensions contain hierarchies. The hierarchies contain levels and the levels contain members.

An example of a dimension is Locations. A Locations dimension may contain two hierarchies: Locations by Organization Structure and Locations by Geography. Either of these hierarchies may contain levels like Country and City.

Members are the instances in a level. For example, New York and London are members in the City level. A member may have multiple properties, such as Population, Latitude, and Longitude. Internally, a member is identified by a Member Unique Name (MUN). The method by which a MUN is derived depends on the cube vendor.

Relational data models are made up of data subjects, such as Employees, which are made up of data items, such as Name or Extension. These data items have values, such as Peter Smith.

In Cognos 8, the available methods of drilling through are:

- Dimensional (member) to Dimensional (member)
- Dimensional (member) to Relational (data item value)
- Relational (data item value) to Relational (data item value)

If the target parameter is a member, the source must be a member and must also be from a conformed dimension.

If the target parameter is a value, the source can be either a value or a member. If the source is a dimensional member, you must ensure that the level or dimension is mapped to the target data item correctly in the drill-through definition. The business key from which the member is sourced must match the relational target value, which is most often the business key.

Member Unique Names

The member unique name (MUN) is a unique identifier for a member in Cognos reports. It is stored in the report specification when the member is referenced in the report directly. The MUN is used in drill-through operations between OLAP data sources. The member keys in the MUN for the different OLAP data sources must match.

The MUN is used to find the member in the data source, which is similar to how business keys are used to find records in a table. For example, when you create OLAP dimension Products, you use the Product Line database column as s label for the members in your Product Line level. However, you use the Product Line Code business key from the database table to ensure that all the Product lines are unique in that level. The source value that you used to create the members is used in combination with the data source name, hierarchy, and level information in the member unique name.

If the MUN changes, members that are directly referenced in expressions, filters, or reports are no longer found. Changes to the MUN may be related to other changes. For example, changes to the hierarchy and level structures may change the level unique name, and changes to the business key values may change the member key path. Other factors that can affect the MUN are application changes during the design stage or over time, Cognos PowerCube category codes that are unpredictably unique, the production environment that has more members than the test environment, or removing the member from the data source.

To avoid potential problems, we recommend the following best practices when you build OLAP data sources:

- Use unique codes and keys within a dimension for the member keys.
- Define your OLAP and relational packages using unique conformed values for the source values (business keys) within similar dimensions or data values where drill-through operations between applications may be required.
- Ensure that the business keys and dimension metadata structure are the same in the production and test environments.
- Do not change the business keys in Framework Manager in the production environment.
- Resolve the non-unique keys in a dimension in the data source before you build the cube.

  Ensure that there are no duplicate source values in all levels of a dimension before you build a PowerCube. We do not recommend using the tilde character (~) in the category codes.

  For more information, see the section about uniqueness in Cognos Series 7 *Step-by-Step Transformer.*

Conformed Dimensions

If you work with more than one dimensional data source, you may notice that some dimensions are structured the same, and some are not. The reason that dimensions can be structured differently is that the data sources may serve different purposes.

For example, a Customer dimension appears in a Revenue data store, but not in an Inventory data store. However, the Products dimension and the Time dimension appear in both data stores.

Dimensions that appear in multiple data stores are conformed if their structure is identical for all of the following:

- hierarchy names
- level names
- level order
- internal keys

Drilling through is possible between different dimensional data stores only if the dimensions are conformed, and if the dimension data store is of the same vendor type, such as Cognos PowerCube as the source and the target. In the previously mentioned example of the Revenue and Inventory data stores, it is possible to define the Products and Time dimensions differently for each data store. However, for drill-through operations between the Products and Time dimensions to work, their structures must be identical in each data store.

Business Keys

When performing a drill-through operations from a member to a relational value, the business key of the member is passed. This means that your relational target parameter must be set up using the data item with a matching value, which is most often the business key data item.

For example, employees are usually uniquely identified by an employee number, not by their name, because their name is not necessarily unique. When you drill through from a dimensional member to a relational data item, the value provided is the business key. Therefore, the parameter in the target report must be defined to accept a business key value. The exact logic used to define the business key value supplied depends on the cube vendor. For Cognos PowerCubes, the business key value is the **Source** property defined for the level in Cognos Series 7 Transformer. Cognos Series 7 Transformer PowerCubes pass the source value if the drill-through flag was enabled before the cube was built. Otherwise, the category code is used.

In Report Studio, you can determine what the member business key is using an expression such as `roleValue('_businessKey',[Camping Equipment])`. This expression is case sensitive.

Microsoft SQL Server Analysis Services 2005 multi-part business keys are not supported in drill-through operations.

Tip: When other users run your drill-through report, you may not want them to be prompted for a business key. In Report Studio, you can build a prompt page with a text that is familiar to the users, but filters on the business key. Your Framework Manager modeler can also set the **Display Item Reference** option for the **Prompt Info** property to use the business key when the data item is used in a prompt.

Drilling Through on Dates Between PowerCubes and Relational Packages

Usually, drilling through from OLAP to relational packages requires that the target report parameter is set using the business key in the relational data. However, this method does not work well for dates. OLAP data sources typically view dates as members, such as Quarter 1 2006, while relational data sources view dates as ranges, such as 1/Jan/2006 to 31/March/2006.

A special feature exists for drilling through between PowerCubes and relational packages. Ensure that the target report parameter is set up using `in_range`. Here is an example:

```
[gosales_goretailers].[Orders].[Order date] in_range
?Date?
```

Also ensure that the drill-through definition maps the parameter at the dimension level and that the PowerCube date level is not set to suppress blank categories. Enabling the option to suppress blank categories in the Transformer model before you build the cube may cause the drill-through on dates to be unsuccessful. This happens because there are missing values in the range.

Drilling Through Between Packages

You can set up drill-through access between different packages. The two packages can be based on different types of data source, but there are some limits.

The following table shows the data source mappings that support drill-through access.

Source data source	Target data source
OLAP	OLAP **Note:** OLAP to OLAP drill through is supported only if the data source type is the same, for example, MSAS to MSAS.
OLAP	Dimensionally modeled relational
OLAP	Relational data For more information, see the Cognos 8 *Administration and Security Guide*.
Dimensionally modeled relational	Dimensionally modeled relational
Dimensionally modeled relational	Relational
Relational	Relational

Scope

Scope is specific to drill-through definitions created using **Drill-through Definitions** in Cognos Connection. It defines when the target report is shown to the users, based on the items they have in the source report.

Usually, you define the scope of a drill-through path to match a parameter that it passes. For example, for a target report that contains a list of employees, typically you only want to display the report as an available drill through-choice when a user is viewing employee names in a source report. If employee names are not in the source report and the scope was set on the employee name in the drill-through definition, the employee report is suppressed from the list of available drill-through target reports in the **Go To** page.

In report-based drill-through access, where the drill-through path is associated with a specific report column, the column serves as the scope.

Set Up Drill-through Access in a Package

A drill-through definition in Cognos Connection is associated with a source package. You can define drill-through definitions between the reports created in the different Cognos 8 studios, and the reports based on different packages and data sources. The drill-through path defined in the drill-through definition is available to any report based on the source package.

A drill-through definition contains:

- a target report

  The target report is based on any target package in Cognos Connection and can be stored anywhere.
- scope

  Specifies when the target report is shown to the user. For example, when the scope is set to "Product Line", the target report is shown as an available choice in the **Go To** page only when data from "Product Line" is selected in the source report.
- action

  Specifies the run options for the target report.

The **View most recent report** option should be used with reports that contain bookmark references.

- format

  Specifies the format, such as PDF or HTML, in which users view the target report.

- parameter mappings

  When the target report is referenced in the drill-through definition, all parameters in it are visible. To ensure successful drill-through, the parameters should be mapped to the source package metadata.

- bookmark references

  Use this property when the **Action** property in a drill-through definition is set to **View the most recent report**, and the report contains bookmark references. This option helps the users to find the data they need without running a large report.

  For example, you have a large report scheduled to run on a daily or weekly basis during off hours because of resource considerations. Your users may want to view this report as a target because it contains detailed information on a particular topic, such as the inventory, but you want them to view the saved output rather than run this large report. Using this option and bookmark settings, the user can drill through from another source location based on products to open the saved report to the page showing the product they want to focus on.

- display prompt pages

  Controls when prompts are displayed during the drill-through activity. For example, you may want the prompts to always appear, regardless of whether they are fulfilled or not. Alternatively, you may never want the prompts to appear if they are unfulfilled.

You can specify drill-through paths for packages using **Drill-through Definitions** in Cognos Connection. Any source report created in the package can drill through to targets defined in any other package if the users select information in their source report that is within the scope of the drill-through path. For example, all reports authored in the Great Outdoors Company sample package can access any drill-through definition created in this package.

You can create a new drill-through definition, or edit an existing one. Before you create a drill-through definition, you must understand some important concepts about drill-through access.

The target report must be created before you start creating the drill-through definition in Cognos Connection. Drill-through targets can be reports, analyses, report views, and queries. If you want the target report to be filtered with the values passed from the source, ensure that the target report contains parameters.

Drill-through definitions support both dimensional and relational packages, and are available to Analysis Studio, Query Studio, and Cognos Viewer.

Steps to Set Up Target Parameters

1. Open the target report
2. Create a parameter that will serve as the drill-through column, or that will be used to filter the report.

   For example, to drill through or filter on Product line, create a parameter that looks like this:

   ```
   [Product line]=?prodline_p?
   ```

   Tip: Use the operators `in` or `in_range` if you want the target report to accept multiple values, or a range of values.
3. In the **Usage** box, specify the action to take when the target parameter is not fulfilled as part of a drill-through action.
   - Click **Required** to specify that users must click a value in the source report if the parameter is required, but not fulfilled.
   - Click **Optional** to specify that users do not need to click a value in the source report if the parameter is not fulfilled.
   - Click **Disabled** to specify that the parameter is not used by the drill-through action.

Note: The drill-through definition controls when prompt pages or parameters are displayed.

Steps to Create a Drill-through Definition

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Drill-through Definitions**.
2. Click a package name to create a new drill-through definition for that package.

   This package is considered the source package and the drill-through definition you are creating will be available by default to any report in this package.

3. Click the new drill-through definition button on the toolbar.
4. Type a name for the drill-through and, if you want, a description and screen tip. Click **Next**.
5. Set the scope and target, and click **Next**.

   The scope specifies whether the target report in the drill-through definition is available to the user in the **Related Links** page. If you want to make the target report available regardless of what is included in the report, in the **Set the scope** page, click **Entire package**, which is the default setting for scope.

   The target report can be based on any package in Cognos Connection, but when drill-through definitions cross packages, you must consider the data types used in both the source and the target, and ensure that the created parameters are appropriate for your scenario.

   The target report can be located anywhere in Cognos Connection. The user must have execute permissions for the report to use it in a drill-through.
6. Specify the target details.
   - In the **Action** section, specify the action for a drill-through link.

     The default action is to run the target report, analysis, or query.

     If you change the action to **View most recent report**, you do not need to map the target parameters to the source package metadata. The **Display prompt pages** property will be disabled because you will be using a previously run report. Running the report requires that the target report parameters are mapped to the source package metadata.

     If you change the default action to open with Analysis Studio or Query Studio, you must also map the target report parameters to the source package metadata.
   - In the **Prompt Values** section, specify parameter values.

     Every parameter that exists in the target report should be mapped to the appropriate source package metadata in order for the drill-through to successfully filter the target report with data from the source report.

     If you do not map target parameters to the source package metadata, the source report does not pass anything to the target parameter. If your target report is not receiving any parameters, check the mapping in your drill-through definition, and ensure that your parameters were created against the correct data type for your drill-through scenario. For example, if you want to create a drill-through definition from an OLAP package to a target report based on a relational package, your target parameters need to be set up to a query item that has the same value as the OLAP business key.
   - In the **Display prompt pages** section, specify when the prompt pages will appear.

     Only when required parameter values are missing

     The prompt pages are not displayed when the required parameter values are provided by the drill-through definition. This is the default.

     Always

     The prompt pages are always displayed when the drill-through action occurs, regardless of whether values were specified for the required parameter values.

     Based on the default prompt settings of the target report

     The prompt pages are displayed or not displayed depending on the prompt settings of the target report specified by the **Prompt for Values** check box in Cognos Connection - Report Properties - **Report** tab.
   - Click **Bookmark References** to specify a bookmark reference to pass to the target report.

     Tip: Use this option only when the target report is a previously run PDF report that has bookmarks.
   - Click **Finish**.

Steps to Edit an Existing Drill-through Definition

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Drill-through Definitions**.
2. Click a package name to view its drill-through definitions.
3. Click the set properties button on the actions toolbar to the right of the drill-through definition that you want to modify.
4. Click the **Target** tab.
5. Make the necessary modifications, and click **OK**.

Set Up a Drill-through Target in Analysis Studio

You can create a drill-through target analysis and add target parameters in the analysis by setting a dimension or a level as the **Go To** parameter. Set the dimension as the **Go To** parameter for drill-down and drill-through within the dimension. This will allow you to perform a drill-down or drill-through action, but only the level, which is currently in your view, is passed. This applies to any query, report, or analysis used in Cognos 8 drill-through action. A source report can then pass the current selection of values to the target analysis.

You can set multiple parameters in an analysis target. However, you cannot pass members within a selection set in Analysis Studio.

Steps

1. In Analysis Studio, create a cross-tab analysis using the package that was set up for drill-through analysis.
2. If you want, add as a row or column the data item that you want to be the prompt.
3. Move or add the dimension or level that you want to be a target parameter to the **Context** area.

   Note: You cannot pass members within a selection set in Analysis Studio.
4. View the list for the item in the **Context** area and click **Use as "Go To" Parameter**.
5. Save this analysis as your target report in Cognos Connection.

   You can now create the drill-through definition under a source package.

When you create the drill-through definition and use the cross-tab analysis as a target, the **Go To** parameter item in the analysis appears as a drill-through parameter. You can map to this parameter the same way that you drill through to Report Studio or Query Studio reports.

Debugging a Drill-through Definition

Cognos 8 includes a debugging functionality that you can use to find problems with your drill-through definitions created in Cognos Connection, and to correct any drill-through errors. It can also help you understand how the drill-through functionality works, especially across different types of data sources. This functionality is also referred to as the Drill-through Assistant.

The Drill-through Assistant provides the following information:

Passed Source Values

Shows the values selected by the user when invoking the drill-through action that are available for passing to the target report. For example, if you drill through from a source in Analysis Studio, you see the values at the intersection you selected prior to the drill-through action, as well as any values in the context area. The values in the debug list are the values in the source report that were not transformed by any drill-through operation.

- Display Value

  Shows the value that users see when using this data item or this member. For OLAP members, this is the member caption or label. For example: `Telephone` is a member from the `Order Method` dimension.
- Use Value

Shows the value that Cognos reports and analyses use when retrieving the data item or the member. For OLAP members, this is the member unique name (MUN). For example: `[great_outdoors_company].[Order Method].[Order Method].[Order Method1]->:[PC].[@MEMBER].[2]` is the MUN for the `Telephone` member in the `Order Method` dimension.

Target Mapping

Shows the name of the parameter that was mapped in the drill-through definition, and the values that the source is attempting to pass to that parameter.

- Parameter Name

  Shows a list of valid target parameters mapped in the drill-through definition to receive information from the query item, level, or hierarchy on which you performed the drill-through action.

  You can see only parameters for which there is a valid mapping and only the names of the parameters. For example, if the target report contains a parameter for `Product Type` and the drill-through definition maps that target parameter to the source `Product Type` level metadata, you see this target parameter only if you attempt to drill through on the `Product Type` level in the source report. Drilling through on the `Product Line` level does not display this parameter target.

  You must ensure that the target parameters in your drill-through definitions are mapped correctly. Incorrectly mapped parameters can receive information from the wrong source metadata, especially where you have data values that are not unique. If you cannot see any target parameters or the parameters you expected to see in the **View Target Mapping** list, check the parameter mapping in the drill-through definition.

- Display Value

  Shows the value that users see when using a data item or member. For OLAP members, this is the member caption or label. For example: `Telephone` is a member from the `Order Method` dimension

- Use Value

  Shows the transformed value that the drill-through definition uses when passing a data item value or member to the target parameter.

  OLAP members passed to relational target parameters obtain the business key from the members MUN and pass only the business key. Using the above example of the `Telephone` member in `Order Methods`, the business key is `2`. If you are unsure of what the business key is for a member, you can write a Report Studio expression such as `roleValue('_businessKey',[member])`. This value is passed to the target parameter.

  OLAP members passed to a target parameter based on another OLAP package of the same OLAP type show a transformed MUN. Using the above `Order Methods` example, the MUN is now transformed and the drill-through definition uses the value of `[great_outdoors_company].[Order Method].[Order Method].[Order Method1]->[Order Method1]. [2]:[PC].[@MEMBER].[2]`. The middle portion of `[Order Method1][2]` is where the drill-through definition finds the correct member in the target when the OLAP data sources are different. To see the MUN for a specific member, you can look at the properties of the member in Report Studio and look at the `Member Unique Name` property.

Access the Drill-through Assistant

You can use the Drill-through Assistant for debugging purposes when you work with drill-through definitions in Cognos Connection.

To use the this functionality, you must have the required permissions for the **Drill Through Assistant** secured function in Cognos Administration.

Steps

1. Select a link in your source report, right-click the link, and select **Go To**, **Related Links**.

   The **Related links** page is displayed with the list of available target reports. If your target report is not shown, review the scope settings in your drill-through definition.

2. Click **View passed source values** to see the values that are available for passing by the source report.
3. Next to the target report, click the down arrow and choose one of the following options:
   - **Run the report**

     Runs the target report.
   - **View Target Mapping**

     Shows the valid mapped parameters for the available source values, and the use and display values that the drill-through definition will receive.

Example - Debugging a Drill-through Definition

Your OLAP source has a Products dimension with the levels Line, Type, and Name. You have defined a parameter in your relational target to match each level of that OLAP source dimension. You can have a situation where you see all target parameters from a single dimension displayed in the **View Mapped Target** list. This is likely because the individual target parameters are mapped to a single dimension in the drill-through definition, in this case the Products dimension. In your OLAP data source, you have a business key value, or the source value used to create the members, that is duplicated in all three levels.

Parameter Name	Display Value	Use Value
Prod Line Param	Camping Equipment	1
Product Type Param	Cooking Gear	1
Product Name Param	Trail Chef Water Bag	1

Having all three parameters mapped to the Products dimension is correct if the use values are not duplicated in the dimension. In the above table, you can see that members from all three levels have the same use value. In this case the drill-through operation cannot determine which level is the correct one because the scenario indicates that all levels are valid. In this situation, the first level encountered with a valid business key or use value is fulfilled by the drill-through definition. This can result in unexpected behavior.

This example shows why it is important to always ensure that your data warehouses and OLAP sources are designed with unique business keys or source values. To correct this situation, the drill-through definition should have each individual target parameter mapped to each associated level in the source metadata rather than in the dimension.

Set Up Drill-through Access in a Report

Use Report Studio to create a source drill-through report to link two reports containing related information. You can then access related or more detailed information in one report by selecting a value or multiple values in the source report. You can also drill through within the same report by creating bookmarks.

If you are using an SAP BW data source for the target report, and if the target report contains a variable for a hierarchy node, values from the source report can only be values of the data item that represents the leaf-level identifier in the hierarchy.

Before you begin, ensure that you have a report that will serve as the source report and another report that will serve as the target report. The target report must contain one or more parameters that represent the drill-through data items. For more information, see the Report Studio *User Guide*.

Tip: If you want to use a Report Studio report as a source in a drill-through definition in Cognos Connection, open the report, and from the **Data** menu, click **Drill Behavior**, and then select the **Allow package based drill-through** check box.

Steps

1. Open the target report.
2. Create a parameter that will serve as the drill-through column or that will be used to filter the report.

   For example, to drill through or filter Product line, create a parameter that looks like this:

   [Product line]=?prodline_p?

   Tip: Use the operators `in` or `in_range` if you want the target report to accept multiple values or a range of values.
3. In the **Usage** box, specify what to do when the target parameter is not fulfilled as part of a drill-through:
   - To specify that users must click a value in the source report, click **Required**.

     If the parameter is not fulfilled and it is required, users are prompted to choose a value.

     Note: Drill-through definitions that have been authored inside a Report Studio report appear to the consumer as a blue hyperlink. Clicking the hyperlink is how they drill through to the target report and select the value they want passed to the target.

     A consumer can choose to select multiple items within a single column and when the drill-through target report is run, the values from each row selected will be passed to the target parameters. This occurs as an *and* condition.
   - To specify that users do not need to click a value in the source report, click **Optional**.

     Users are not prompted to choose a value if the parameter is not fulfilled. The value will be unfiltered.
   - To specify not to use the parameter, click **Disabled**.

     The parameter is not used during the drill-through.
4. To create other parameters, repeat steps 2 to 3.
5. Open the source report.
6. Click the element in the report that will serve as the drill-through object.

   You can select a data item that your report users are likely to choose to drill on for more detailed information, such as an Employee Name data item. When defining the drill-through path in Report Studio, you can choose to pass a value from a different data item hidden from the user for display purposes, but still in the query. For example, your users see the Product Name data item and can drill through on that item but the drill-through definition passes the Product Number value for that particular product name that the user has chosen.

   Tip: If you are passing only parameter values to the target report, you do not have to drill on a data item. Instead, you can drill on any object in the report, such as the report title. This means that you can drill from outside the context of a query.

7. Click the drill-through definitions button or from the **Properties** pane, double-click the **Drill-Through Definitions** property.
8. Click the new drill-through definition button.

   A drill-through definition is created.

   Tip: To change the drill-through name, click the rename button, type the new name, and click **OK**.
9. On the **Target report** tab, click the ellipsis (...) button next to the **Report** box, and select the drill-through target report.

10. Under the **Parameters** box, click the edit button.

    Each required and optional parameter defined in the target report appears in the **Parameters** dialog box.
11. For each parameter, click **Method** and do one of the following:
    - To specify not to pass any value, click (**Default**).

      That is, the default method is to not pass any value.
    - To specify not to use this parameter, click **Do not use parameter**.

      The target report is not be filtered by this parameter.
    - To pass values from a data item, click **Pass data item value**, click **Value**, and then click the data item that you want.

Values for the selected data item are passed to the target report.

- To pass values from a source report parameter, click **Pass parameter value**, click **Value**, and then click the parameter that you want.

  Values for the selected parameter are passed to the target report.

12. Click **OK**.
13. In the **Action** box, decide how the target report will be viewed when users click the drill-through column in the parent report:
    - To run the target report, click **Run the report**.

      Run the target report when you want to see the latest data.
    - To view the most recently saved output version of the target report, click **View the most recent report**.

      Saved output versions are created in Cognos Connection.
    - To use the default action specified for the report in Cognos Connection, click (**Default**).
14. If you chose to run the target report in the previous step, in the **Format** box, click the output format you want for your report.

    Tip: Click (**Default**) to run the report using the default format specified for the report in Cognos Connection.
15. If you want the target report to appear in a new window, select the **Open in new window** check box.
16. In the **Display prompt pages** box, decide whether to display prompt pages:
    - To always display prompt pages when the drill-through action occurs, regardless of whether values were specified for the required parameter values, click **Always**.
    - To use the prompt settings of the target report (specified by the **Prompt for Values** checkbox in Cognos Connection - Report Properties - Report tab) to determine whether to show the prompt pages, click **Based on the default prompt settings of the target report**.
    - To not display prompt pages when the required parameter values are provided by the drill-through definition, click **Only when required parameter values are missing**. This is the default.

The drill-through object appears as a blue hyperlink in the report. This drill-through action can also be started by clicking the **Go To** button. When users run the source report, they can click the object to drill through to the target report. If more than one target report is available, the **Go To** page appears with the list of available targets.

Tip: If you run the target report directly, you are prompted to select a value for the report to run on.

Specify the Drill-through Text

You can specify the drill-through text that appears when users can drill through to more than one target. For example, if users from different regions view the report, you can show text in a different language for each region.

Steps

1. Right-click the drill-through object and click **Drill-Through Definitions**.
2. If more than one drill-through exists for the object, in the **Drill-Through Definitions** box, click a drill-through definition.
3. Click the **Label** tab.
4. To link the label to a condition, in the **Condition** box, do the following:
   - Click **Variable**, and click an existing variable or create a new one.
   - Click **Values**, and click one of the variable's possible values.
5. In the **Source type** drop-down list, click the source type you want to use.
6. If the source type is **Text**, click the ellipsis (...) button beside the **Text** box and type the text you want.
7. If the source type is **Data Item Value** or **Data Item Label**, click **Data Item**, and click a data item.

8. If the source type is **Report Expression**, click the ellipsis (...) button beside the **Report Expression** box and define the expression.
9. If the label is linked to a condition, repeat steps 5 to 8 for the remaining possible values.
10. Click **OK**.

When users run the source report and click a drill-through link, the **Go to** page appears. The drill-through text you specified appears for each target. If you did not specify the drill-through text for a target, the drill-through name is used.

Example - Create a Drill-through Report

You are a report author at The Great Outdoors Company, which sells sporting equipment. You are requested to create a report that lists product sales by order method for each product line, and allows users to drill through from the sales report to view the product details for any item selected. You will create two reports, one that contains the details for the item, and another that lists the product sales for the order methods selected by users.

Steps

1. In the Cognos Connection **Welcome** page, click the **Launch** link, and then click **Report Studio**.
2. Select the package **GO Data Warehouse (query)**.
3. In the **Welcome** dialog box, click **Create a new report or template**.
4. In the **New** dialog box, click **List** and click **OK**.

5. In the **Insertable Objects** pane, on the **Source** tab, add the following data items to the list by double-clicking them:
   - **Order method**
   - **Product line**
   - **Product type**
   - **Product name**
   - **Introduction date**
   - **Product image**

   Tip: You can find these data items in the **Order method** and **Product** folders.
6. Group the **Order method**, **Product line**, and **Product type** columns.

7. Click the filters button.
8. Click the add button, and type the following in the **Expression Definition** box:

   [Product name]=?p_PN?
9. Click **OK**.
10. Repeat steps 8 to 9 to create the following filter:

    [Order method] in ?p_OM?
11. Change the title of the report to **Product Details**.
12. Save the report as **Product Details**.
13. From the **File** menu, click **New** to create a new report.
14. In the **New** dialog box, click **List** and click **OK**.
15. In the **Insertable Objects** pane, on the **Source** tab, add the following data items to the list by double-clicking them:
    - **Order method**
    - **Product line**
    - **Product type**
    - **Product name**
    - **Quantity**
    - **Revenue**

    Tip: You can find these data items in the **Sales fact** and **Product** folders.
16. Group the **Order method**, **Product line**, and **Product type** columns.

17. Click the filters button.
18. Click the add button, and type the following in the **Expression Definition** box:
    [Order method] in ?p_OM?
19. Click **OK**.
20. Right-click the **Product Name** column and click **Drill-Through Definitions**.

21. Click the new drill through button.
22. Under **Report,** click the ellipsis (...) button and select the **Product Details** report you created previously.
23. Click **Action** and click **Run the report**.
24. Click **Format** and click **HTML**.

25. Click the edit button.
26. For the item **p_OM**, under **Method**, select **Pass parameter value**, and select **p_OM** for the **Value**.
27. For the item **p_PN**, under **Method**, select **Pass data item value**, and select **Product name** for the **Value**.
28. Click **OK** twice.
29. Change the title of the report to **Product Revenue by Order Method**.
30. Save the report as **Product Revenue by Order Method**.

31. Click the run report button.

When the report runs, you are prompted to select one or more order methods. When you click **OK**, the list shows the product names as clickable links. When you click a product name, the second report runs, showing the order method that was selected in the prompt page of the source report and the product (the source report's column value) selected in the first report.

Drilling Through from Cognos Series 7 to Cognos 8

You can set up drill-through access from Cognos Series 7 to Cognos 8. Specifically, you can drill through to a Cognos 8 report from a PowerPlay Web report or Cognos Visualizer report. Drill through is supported for both PowerCubes and third-party cubes.

You must complete steps in both Cognos Series 7 and Cognos 8 to enable drill through. Refer to the Cognos Series 7 documentation for the specific steps you must complete in the Cognos Series 7 components. Cross references to the appropriate Cognos Series 7 documents are included below.

Setting Up Drill-through Access from PowerPlay Web

Setting up drill-through access from PowerPlay Web to Cognos 8 involves

- for PowerCubes, specifying drill-through targets for Cognos 8 reports in the Transformer model

  For more information, see the Transformer documentation.
- for third-party cubes, specifying drill-through targets for Cognos 8 reports in PowerPlay Connect.

  For more information, see the Cognos Series 7 PowerPlay *OLAP Server Connection Guide*.
- configuring drill-through access in PowerPlay Server Administration

  In addition to enabling drill-through access to Cognos 8, you must specify the location of the Cognos 8 server and the Cognos 8 folder that contains the target reports. For more information, see the Cognos Series 7 PowerPlay *Enterprise Server Guide*.
- selecting the filters to add to the target report

  In Cognos Series 7 PowerPlay Enterprise Server Administration, enable and use Cognos 8 Assistance to identify the filter expressions required in the target report. For more information, see the PowerPlay *Enterprise Server Guide*.
- creating and testing the target report

Setting Up Drill-through Access from Cognos Visualizer

Setting up drill-through access from Cognos Series 7 Cognos Visualizer to Cognos 8 involves

- specifying the Cognos 8 target and selecting the filters to add to the target report

  You must configure drill through to Cognos 8 for individual Cognos Series 7 Cognos Visualizer reports. For more information, see the Cognos Visualizer *User Guide*.
- creating and testing the target report

Create and Test the Target Report

The target report must be based on a published package that contains the metadata items that you want to filter on, or contains items that are mapped to those metadata items.

When you create the target report, ensure that the names of the parameters you add are identical to the parameter names listed in the **Drill Through Assistant** page in Cognos Series 7. However, the metadata item that you use in the target report for that parameter name does not have to be the identical label. The data values between the target parameter and the source value shown in the drill assistant must match. You may also need to change the type of operator in the target parameter from what is recommended in the **Drill Through Assistant**. For example, if the assistant recommends an = operator but you want to pass a date range, you should change the parameter operator in the target to `in_range`.

Steps

1. Start Report Studio and create a new report.
2. Add the data items and other objects you want.

3. From the **Data** menu, click **Filters**.
4. In the **Detail Filters** tab, click the add button.
5. In the **Expression Definition** box, create the parameterized filter you want by typing the filter expression.
6. Click **OK**.
7. In the **Usage** box, click **Optional**.

   If you do not make the filter optional, a prompt page appears when you drill through to the report.
8. Repeat steps 4 to 7 for other parameterized filters you want to add.
9. Save the report.

   The report name must match what you specified as a target in the PowerCube, third-party cube, or Cognos Visualizer report.
10. Test the drill through in the Cognos Series 7 PowerPlay report or Cognos Visualizer report.

Chapter 3: Take Advantage of Cognos 8 Features

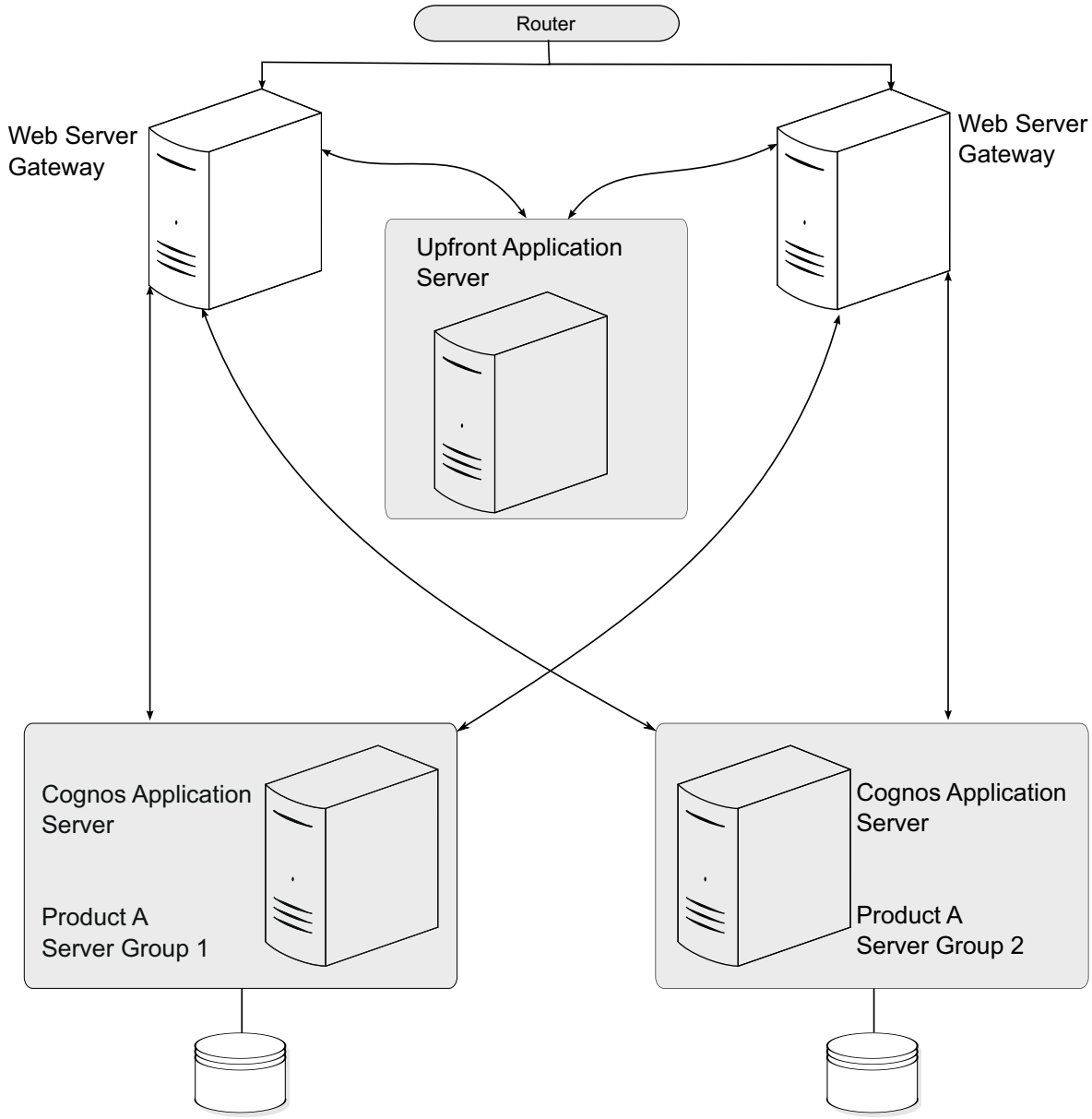
When you have established interoperability between Cognos Series 7 and Cognos 8 for your existing Cognos Series 7 applications, you can go further: build on your investment in Cognos Series 7 by taking advantage of the new features in Cognos 8. In particular, as you have published your cubes to Cognos 8, you can start reporting on them from the Cognos 8 studios without any changes to the cubes. You can create managed reports and dashboards against your existing cubes.

Cognos 8 BI offers improvements and new features on an open, service-oriented architecture. Cognos Series 7 users must learn to perform tasks, such as designing reports, doing analysis, and deploying applications, in Cognos 8. Understanding how Cognos 8 BI is different than Series 7 helps you choose the correct migration options, set expectations, and design applications that are optimized to run on Cognos 8 BI.

Architecture

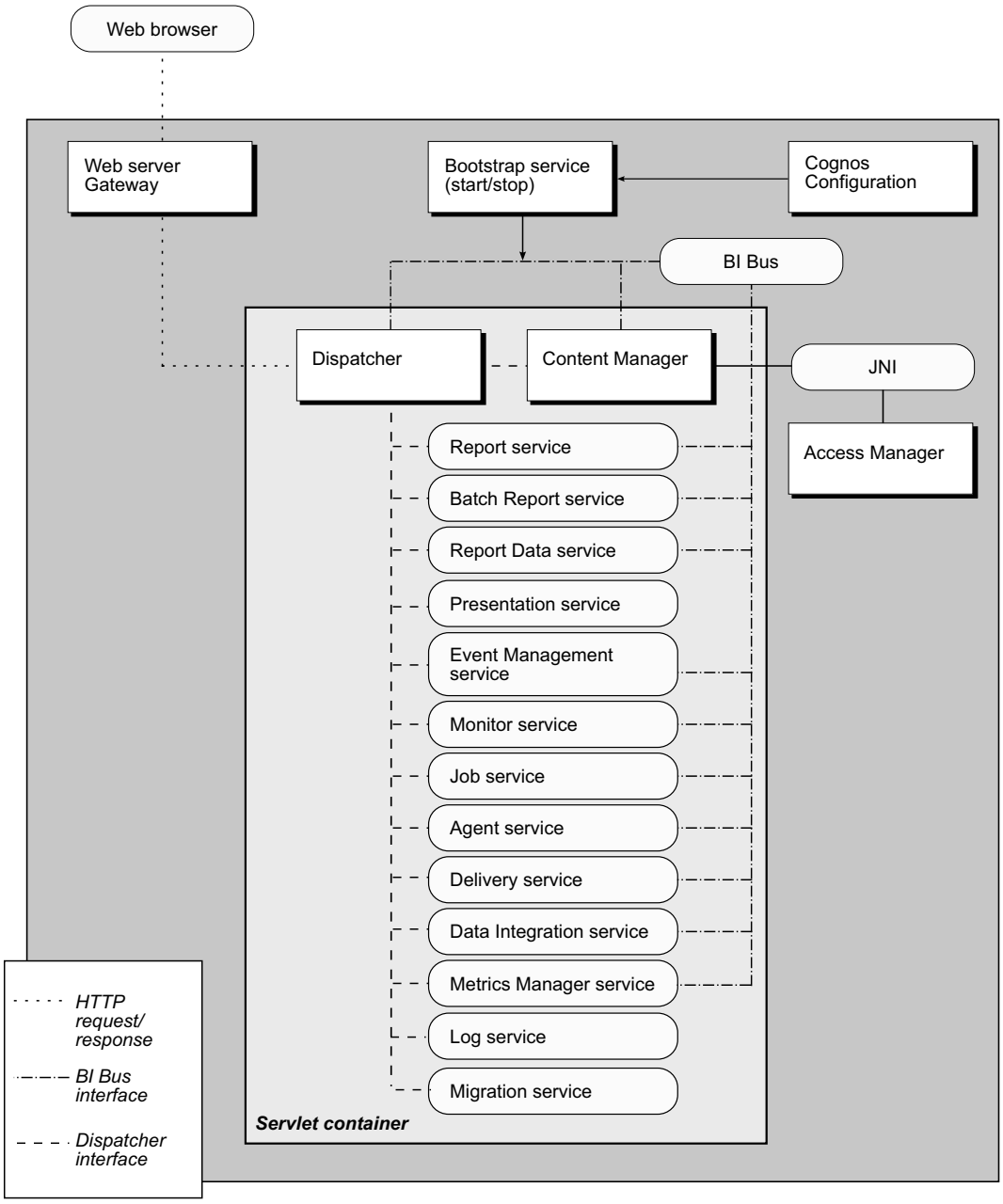
The Cognos Series 7 solution contains a set of products. You can use these products individually or in any combination to provide an integrated solution that meets your business intelligence needs. Each of these products includes both client and server components, from data modeling and authoring tools to server components that can make your Cognos data available across the enterprise. Each Cognos Series 7 product has a different client-server architecture, and may use proprietary application servers and storage formats.

For example, as shown in the following diagram, you can maintain distinct applications that share the same Upfront NewsIndex by using multiple server groups. You can have more than one server group per product, each with its own separate data store, but all can use a common portal. You can install server groups on multiple computers, or install multiple instances of a server group on the same computer.



Similar to Cognos 8, Cognos Series 7 Web products use a three-tier architecture, where the graphical user interface, application servers and data are on separate tiers. However, Cognos 8 BI uses a common, service-oriented architecture for all BI capabilities to support the requirements of business processes and users. There is one query engine to ensure data consistency and a central relational database to store all application content

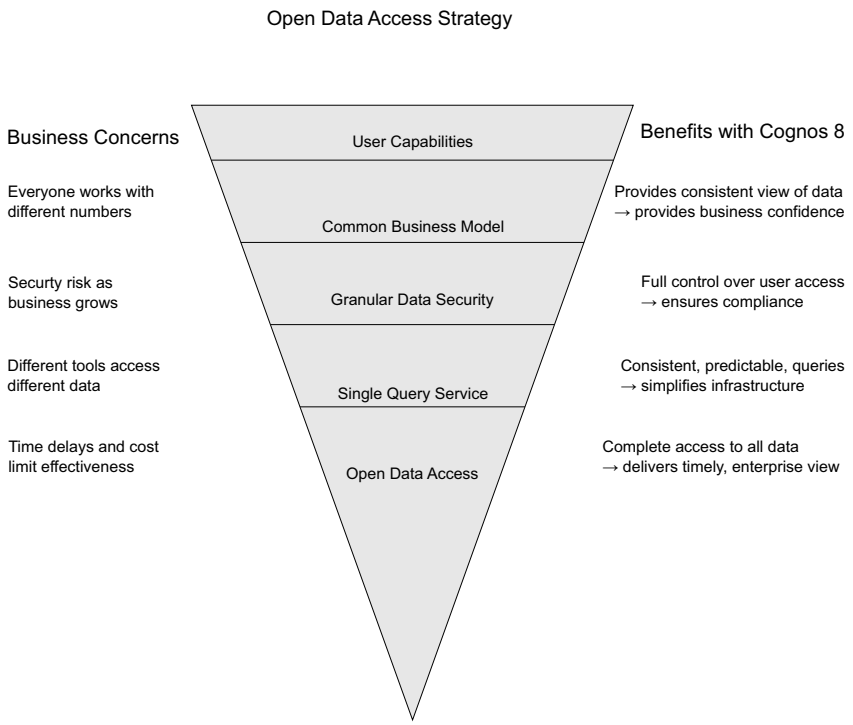
The following diagram shows a detailed view of a Cognos 8 installation in which all services that are installed on a single computer. Each service is independent of other services, and receives requests from a dispatcher.



Data Access

In Cognos Series 7, the metadata you use is different for each product. You are limited to one database or data source for each model, and the metadata is not stored centrally.

Cognos 8 BI provides a common business model and open data access for all users across an organization. Full capabilities are available regardless of where your data is stored, including reporting from OLAP sources and analysis from relational sources. This is a change from data silos that may have existed in Cognos Series 7 because PowerPlay is limited to OLAP data sources and Impromptu is limited to relational data sources.


Open Data Access Strategy
Business Concerns
Benefits with Cognos 8
User Capabilities
Everyone works with different numbers
Provides consistent view of data → provides business confidence
Common Business Model
Securty risk as business grows
Full control over user access → ensures compliance
Granular Data Security
Different tools access different data
Consistent, predictable, queries → simplifies infrastructure
Single Query Service
Time delays and cost limit effectiveness
Complete access to all data → delivers timely, enterprise view
Open Data Access

In Cognos 8, you access data from packages, published from Framework Manager models, to create reports and ad hoc queries. A package can access more than one data source. When you add security and multilingual capabilities to this business presentation, each package can serve the reporting, ad hoc querying, and analysis needs of a particular group. For example, if your data source contains information from different areas of a business, you might decide to create different packages for Human Resources and Finance. In addition, you can add security so that users only see information that they have been granted access to, based on their group or role.

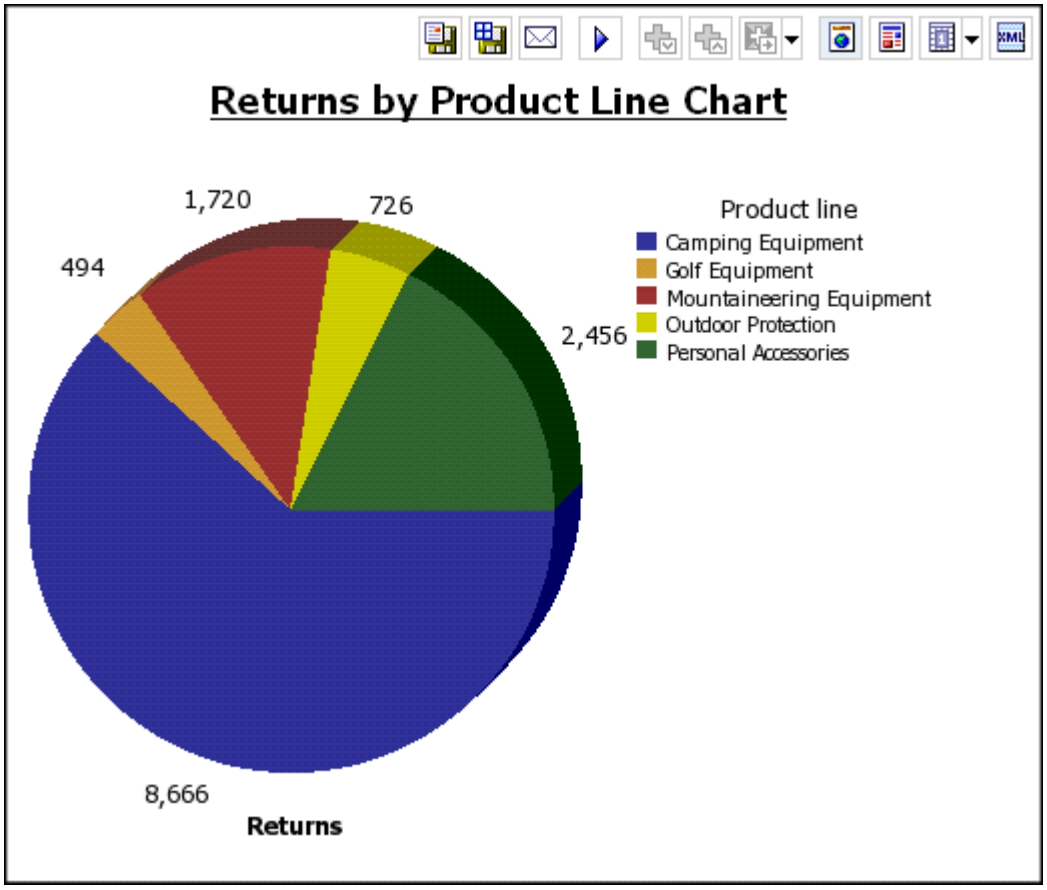
Cognos 8 supports relational, dimensionally modeled relational (DMR), and online analytical processing (OLAP) models.

Managed Reporting

Managed reporting provides a centralized method of report creation and distribution. It delivers fast and easy access to reports for viewing, exploration, and analysis.

Examples of managed reports are

- a crosstab report showing the total sales by product line generated by each sales representative
- a list report showing weekly sales figures for each sales representative
- a list report showing current products in inventory
- a pie chart showing returns by product line



Reporting is done differently in Cognos 8 BI than in Cognos Series 7. In Cognos 8 BI, managed and ad hoc reporting is done in the web-based studios, and the reports and queries are stored in the content store. In Cognos Series 7, you authored reports in Impromptu or PowerPlay before publishing them to the portal.

Cognos 8 enables novice users to run structured ad hoc reports and perform reporting queries. It enables power users and developers to build applications and reporting templates quickly and easily. It enables report authors to re-use reporting objects to apply filters, fields, and styling to ad hoc reports. Cognos 8 allows you to change the language of the user interface and report content depending on the user's native language.

Exploration

Exploration usually begins with a partial definition of the search criteria and an unknown amount of data. As patterns, trends, and exceptions are discovered, the search criteria are refined and the amount of data may change. Usually some effort is required to focus attention on relevant aspects of your data before true analysis can begin.

The following are examples of exploration:

- A regional sales manager looks at a dashboard report and sees that sales are down, but does not know why. He explores to find the reason.
- The COO looks at the revenue generated from franchise license renewals, and sees that renewals are down by twenty percent from the previous year. He drills down to find the reason.
- A marketing manager looks at consumer trends over the past year and sees that the last three months show a decline in product orders. He explores to find the reason.

Business managers who use Cognos products to perform exploration and only light analysis may prefer the simplicity and usability of Cognos Series 7 PowerPlay. Cognos Series 7 PowerPlay performs well when it is used on reasonable amounts of data, while Analysis Studio performs well with large amounts of data, flat dimensions, and when you are doing comparative analysis. PowerPlay and Analysis Studio each deliver a unique user experience and the functionality is different.

Analysis

Applying techniques to describe, and summarize, compare data, and to draw conclusions is part of data analysis. Business analysts seek to understand how the answer varies when comparing different scenarios.

With analysis, it is possible to see trends and understand anomalies or variances that may not be evident with other types of reporting. Analysis Studio users can analyze large volumes of dimensional data.

Business analysts who prepare models to answer questions, test scenarios and hypotheses usually find the functionality in Analysis Studio better suited to their goals than PowerPlay. Analysis Studio can do deep comparative queries and can use dimensionally modeled relational or OLAP data sources.

Feature Differences

Cognos 8 BI provides different features than Cognos Series 7. Sometimes, there is a functional equivalent between a specific feature in Cognos Series 7 and Cognos 8, while other times, there is a change in the functionality. Occasionally, there is no functional equivalent.

The migration tools work best when there is a direct mapping of functionality between Cognos 8 BI and Cognos Series 7. When there is a difference in the way that a feature is implemented, the migration tools attempt to map the functionality if there is a reasonable mapping. For information about mapping Cognos Series 7 objects to Cognos 8 objects, see the *Migration Tools User Guide*.

Sometimes, a feature or functionality in Cognos Series 7 is not currently available in Cognos 8. If the functionality is critical to your application, use interoperability between Cognos Series 7 and Cognos 8 BI.

The following diagram shows a conceptual representation of the migration options based on whether functionality is the same or different between Cognos 8 BI and Cognos Series 7, or whether the functionality is not yet available.

Functionality	Default Strategy	Other Strategy
Same	Lift and Shift	Compress and Optimize to take advantage of new Cognos 8 features.
Different	Compress and Optimize	Lift and Shift and use alternate product features to provide equivalent business functionality.
Not Available	Interoperate	Compress and Optimize or Lift and Shift.

User Experience

In a business organization, the roles and goals of user communities are independent of the products they use. User communities do not change, but the tools they use to achieve their business goals may change. Cognos 8 BI is different from Cognos Series 7, and the user experience for each user community will be different. Retraining to help users learn to do things differently is required for successful user adoption.

When accessing the cost of moving your users to Cognos 8, such as the cost of developing a training plan, for each user community it is important to understand

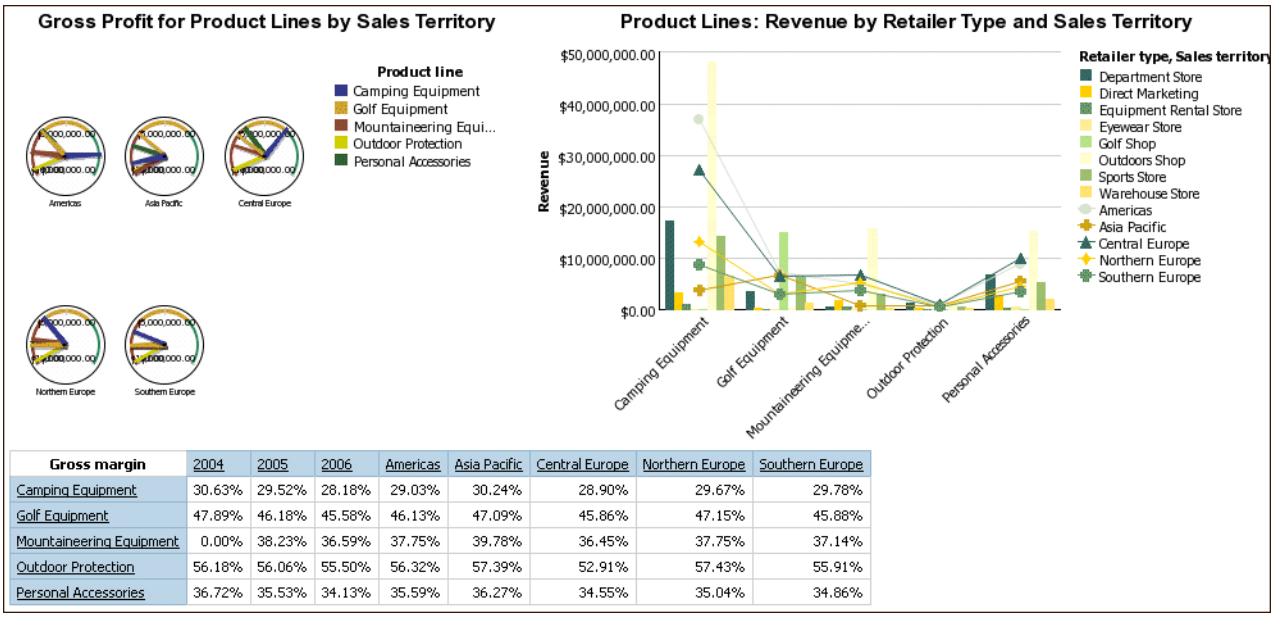
- the Cognos Series 7 tools they use

- how they use the Cognos Series 7 tools
- what tools they will use in Cognos 8

User Experience for Consumers

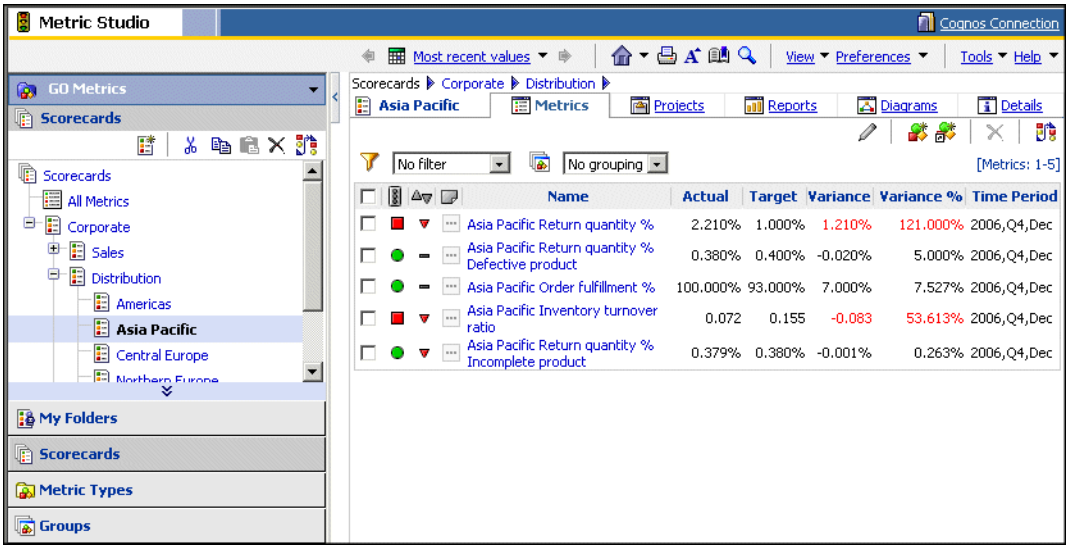
Report consumers commonly use a portal to view reports, analyses, queries, and scorecards. Usually consumers are managers, senior managers or vice presidents who look at dashboards or summary reports to get a high-level graphical view of company performance indicators.

The following is an example of a dashboard report where consumers can drill up and drill down to see higher and lower levels of detail.



Gross margin	2004	2005	2006	Americas	Asia Pacific	Central Europe	Northern Europe	Southern Europe
Camping Equipment	30.63%	29.52%	28.18%	29.03%	30.24%	28.90%	29.67%	29.78%
Golf Equipment	47.89%	46.18%	45.58%	46.13%	47.09%	45.86%	47.15%	45.88%
Mountaineering Equipment	0.00%	38.23%	36.59%	37.75%	39.78%	36.45%	37.75%	37.14%
Outdoor Protection	56.18%	56.06%	55.50%	56.32%	57.39%	52.91%	57.43%	55.91%
Personal Accessories	36.72%	35.53%	34.13%	35.59%	36.27%	34.55%	35.04%	34.86%

Consumers may also track performance against targets using scorecards. Notice that in the following scorecard the metrics appear as either Poor (red), Average (yellow), or Excellent (green). For each metric, you can see whether the trend is up or down.



Consumers can also run and schedule reports, receive notifications, and import reports into Microsoft Office applications. They may also receive reports by email.

Consumers use the following Cognos Series 7 tools:

- PowerPlay viewer to view pre-authored PowerPlay Web reports
- Upfront portal to view pre-authored Impromptu Web Reports

- Cognos Visualizer Web Edition Viewer to view visualizations such as dashboards
- Cognos Notice Cast email notifications based on events that are set up by another user community

In Cognos 8, consumers use the Cognos 8 portal with consumer capabilities and Cognos Viewer to view reports. They can also receive reports by email, schedule a report to run at a specific time, create and manage portal folders and shortcuts, export reports to other formats, set personal portal preferences for language, time zones, appearance, and much more.

User Experience for Business Managers

Business managers use Cognos products to explore information, looking for trends and exceptions.

Examples of a business manager include middle managers who want to understand how their product line is performing. They commonly look at revenue or cost trends over a period of time and explore data on their own, or at the request of a superior, to get more information when exceptions occur.

Business Managers use many of the same Cognos Series 7 tools as consumers in addition to the following:

- PowerPlay Web Explorer
- PowerPlay for Windows
- PowerPlay Excel
- Impromptu
- Cognos Query
- Alerts in PowerPlay Web and Cognos Query

Business Managers who use Cognos Series 7 Impromptu and Cognos Query will likely use Query Studio in Cognos 8 to create simple reports and to accomplish most of their ad hoc query needs. Those who use Cognos Series 7 PowerPlay for Windows and PowerPlay Excel should consider whether using both Cognos Series 7 PowerPlay Web and some Cognos 8 functionality will meet their needs. Otherwise, they should continue to use Cognos Series 7 PowerPlay for Windows and PowerPlay Excel, and set up interoperability with Cognos 8.

User Experience for Analysts

Business analysts may use pre-defined reports as a starting point to sift through large amounts of data to narrow down to smaller amounts of data. They investigate different areas of the business. They focus on getting answers to business questions. Business analysts usually compare data and test hypotheses by changing variables in a number of scenarios.

Usually the business analyst is alerted by a request from another manager or by an email notification to seek an answer to a business question, such as "Who is the top salesman in each region for a specific product and period?". Commonly, analysts rank, or do other types of comparisons to evaluate an item relative to a set of peers.

For example, you can rank a product line, such as golf equipment, to identify how sales for golf equipment for the user compares to other years.

A business analyst uses many of the same Cognos Series 7 tools as consumers in addition to the following:

- PowerPlay Web Explorer
- PowerPlay for Windows in reporter mode
- PowerPlay Excel
- Personal Transformer
- Impromptu
- Cognos Query

Analysts who use PowerPlay Web Explorer may find that Analysis Studio in Cognos 8 will meet their business needs for analyzing and comparing dimensional data. Analysis Studio is different than PowerPlay and requires user training.

Analysts who use Cognos Series 7 Impromptu and Cognos Query will likely use Query Studio in Cognos 8 to create simple reports and to accomplish most of their ad hoc query needs. However, analysts who use Impromptu to define queries for Transformer cubes (.iqd files) should continue to use this functionality in Impromptu because there is no matching functionality in Cognos 8 BI.

Analysts who use Cognos Series 7 PowerPlay for Windows, PowerPlay Excel, and Personal Transformer should continue to use the functionality of these tools while investigating interoperability options with Cognos 8.

User Experience for Disconnected Users

Disconnected users do not have access to the corporate network. Usually these are mobile workers across the organization. They may include sales people who need customer and pipeline details, operations personnel who need supply chain information, and executives who need constant access to business information.

Disconnected users use the following Cognos Series 7 tools:

- PowerPlay for Windows to access local cubes or sub-cubes
- PowerPlay Excel to access local cubes or sub-cubes
- Impromptu snapshots or hotfiles

Cognos 8 Go! Mobile provides a solution for mobile workers who need to access and interact with BI information on their BlackBerry. Cognos 8 Go! Mobile users can continue to access their reports while they are offline, allowing them to continue working while traveling or when the device is not within connectivity range.

Cognos 8 BI does not provide direct access to local cubes, snapshots or hotfiles as many businesses want to move toward increased collaboration and controlled access to data.

Cognos 8 BI enables organizations to increase collaboration and efficiency by creating a "single version of the truth" strategy. Decision makers from different departments can spend less time debating the accuracy of each other's numbers and more time solving business issues.

User Experience for Report Authors

In most organizations, there are professional report authors and business authors.

Professional authors build sophisticated reports for others. They collect report requirements, create the reports, and deploy them. Professional authors may use simple or complex formatting, filters, and prompts.

Business authors use pre-defined reports to understand the status of the business and may build simple queries to focus on variances and exceptions.

Report authors use the following Cognos Series 7 tools:

- Impromptu in client-server mode or to publish to Impromptu Web Reports
- PowerPlay for Windows in client-server mode to publish to PowerPlay Web Viewer
- PowerPlay Web for testing to look at PowerPlay for Windows reports published to PowerPlay Web Viewer
- PowerPlay Web in Explorer mode to create reports using live data
- NoticeCast Administration to set up business events that happen against operational data
- Cognos Query for creating standardized queries (similar to templates)
- Cognos Visualizer to create complex multi-metric visualizations for presentations and reports based on corporate data

Professional report authors who use Impromptu and Impromptu Web Reports to create reports will use Report Studio in Cognos 8 to build sophisticated, multiple-page, multiple-query reports against multiple databases.

Users who author reports in Cognos Series 7 PowerPlay for Windows in client-server mode may use Analysis Studio to set up complex analysis or create reports in Report Studio.

Business authors who use Cognos Series 7 Cognos Query to create simple reports will use Query Studio.

Authors who use Cognos Series 7 Cognos Query to create report templates that provide formatting, such as color, font, and style will likely use features in Report Studio to help them accomplish their goals.

Authors who use Cognos Series 7 Cognos Visualizer to create visualizations that show traffic lights or metrics, will likely use Metric Studio to create scorecards and Report Studio to create dashboards.

Authors who set up notifications to detect operational events will find that the administration functions in Cognos Connection includes email distribution of reports and scheduling. Event Studio has functionality that allows you to set up operational events detection and management.

User Experience for Administrators

Administrators manage the technical deployment of a company's applications, review hardware and software requirements, and may plan the overall system infrastructure, including installation, configuration and system optimization.

In Cognos Series 7, administrators use a number of tools to manage objects, users, and servers including:

- Deployment Manager
- Access Manager
- Configuration Manager
- Access Manager Administration
- Visualizer Administration
- PowerPlay Enterprise Server Administration
- NoticeCast Administration
- Upfront Administration
- Impromptu Web Reports Report Administration
- Impromptu Web Reports Server Administration
- Cognos Query Server Administration
- automation methods, such as application and server automation

The need to administer BI on Windows desktops across the organization is eliminated in Cognos 8. There is a single administration layer for all capabilities. Administration, including deploying content, managing servers, setting up security, and so on, is centralized in Cognos 8. All administration is done in the portal, as shown in the following table.

Administration tool	Use
Directory tool	Create and manage users, groups, and roles, data sources, distribution lists and contacts, and printers.
Drill-through definitions tool	Create, edit, or delete drill-through definitions for packages in Cognos Connection.
Portal administration tool	Manage styles, Cognos portlets, and third-party portlets in Cognos Connection.
Capabilities tool	Control access to secured functions, such as Administration and Report Studio features, such as bursting and user defined SQL.
Schedule management tool	View and manage schedules and jobs.
Server administration tool	View and manage dispatchers, and services, and to tune the performance.
Content administration tool	Deploy Cognos 8, to export from a source environment and then import in a target environment. Perform content store maintenance tasks.

Almost everything the product can do, can be achieved by using the appropriate API, URL interface, or command line utility as illustrated in the table below.

Goal and document	Document	Automation interface	User interface equivalent
To begin basic reporting with the Cognos 8 SDK	*Getting Started Guide*	BI Bus API	Report Studio
To modify a model, or republish it to UNIX or Windows		Script Player tool	Framework Manager
To modify an unpublished model	Framework Manager *Developer Guide* and Framework Manager *User Guide* The update Metadata and query Metadata methods in the Cognos 8 *SDK Developer Guide*	BI Bus API	Framework Manager
To retrieve the query items available in the published package	The get Metadata method in the Cognos 8 *SDK Developer Guide*	BI Bus API	Cognos Connection

Goal and document	Document	Automation interface	User interface equivalent
To grant capabilities	Managing Security in the Cognos 8 *SDK Developer Guide*	BI Bus API	Cognos Connection, Server Administration
To administer and implement security	Managing Security in the Cognos 8 *Developer Guide*	BI Bus API	Cognos Connection, Server Administration
To run, view, and edit reports through a hyperlink in an HTML page	Performing Tasks in Cognos 8 Using URLs in the Cognos 8 *SDK Developer Guide*	URL Interface	Cognos Viewer, Query Studio, and Report Studio
To manipulate objects in the content store	Managing Cognos 8 Content in the Cognos 8 *SDK Developer Guide*	BI Bus API	Cognos Connection, Query Studio, Report Studio, and Framework Manager
To administer reports	Managing Reports in the Cognos 8 *SDK Developer Guide*	BI Bus API	Cognos Connection
To administer servers	Dispatcher Services in the Cognos 8 *SDK Developer Guide*	BI Bus API	Cognos Connection, Server Administration
To modify a report	Customizing Reports in the Cognos 8 *SDK Developer Guide*	BI Bus API and report specification	Report Studio
To modify the functionality of Cognos 8	Hide User Interface Elements and Restricting Content Browsing in the Cognos 8 *Administration and Security Guide*	URL Interface	Cognos Connection, Report Studio, and Query Studio

User Experience for Metadata Modelers

Metadata modelers create a business view of data sources to help users, including department heads, directors, analysts, knowledge workers, business leaders, and executives, to better understand an organization's data assets.

In Cognos Series 7, metadata modelers use the following:

- Impromptu Administrator
- Cognos Series 7 Transformer
- Architect

Framework Manager is the modeling tool in Cognos 8. However, you can continue to use Transformer, or OLAP Builder or OLAP Modeler to model your cubes. OLAP Builder and OLAP Modeler is Transformer in Cognos 8.

Note: To facilitate product recognition, in future releases, OLAP Builder and OLAP Modelers will use Transformer branding.

If you use Impromptu to create Impromptu Query Definitions (.iqd) files for Cognos Series 7 Transformer, you should continue to use this functionality in Impromptu. If you use Transformer with IQD's, or flat files, you can use the same cube in Cognos 8 by using Framework Manager to publish it.

If you use Cognos Series 7 Architect, you will use Framework Manager. If you are using Impromptu Administrator with star and snowflake schemas, then you will use Framework Manager to dimensionally model relational data sources. If you use Impromptu Administrator with normalized databases, then you will also use Framework Manager with query subjects.

If you use Impromptu Administrator to create catalogs, you will use Framework Manager. You can either create new models in Framework Manager using best practices modeling techniques (see Cognos 8 *Guidelines for Metadata Modeling*), or start by migrating your Impromptu catalogs to Framework Manager using the migration tools. If you use the migration tools, you should still apply Framework Manager's best practices to your migrated model.

Establishing Expertise

Assessing and upgrading skills is an important part of the process of moving to Cognos 8 BI.

Individuals with Cognos Series 7 experience, such as data modelers and system administrators, will play an important role in the move. These people will be familiar with the Cognos Series 7 application, or parts of the application. If you engage some of these people in the evaluation of Cognos 8 BI, they can help to identify the similarities and differences between Cognos Series 7 and Cognos 8 BI. They will also be able to assess the training requirements for Cognos 8 BI.

Because some of the basic architecture and concepts of Cognos 8 BI are different from Cognos Series 7, additional training will be required for some groups. The most significant differences are in data modeling and system administration. The individuals involved in these areas will require training to ensure the move to Cognos 8 BI is successful. Other groups may not require significant training. For example, report authors and consumers can quickly learn the Cognos 8 BI studios using self-guided training such as the Query Studio Quick Tour.

Before you develop a training plan for Cognos 8 BI, answer the following questions:

- Who will determine training requirements for Cognos 8 BI?

  Will people with Cognos Series 7 experience evaluate Cognos 8 BI to determine training requirements? Will you engage Cognos Services or consultants for training recommendations?

- How many people require training?

  How many data modelers will work with FrameWork Manager? How many business intelligence administrators will be involved in the deployment and administration of Cognos?

- How will you deliver Cognos 8 BI training?

  Do you have trainers in your company? Will Cognos Services or another contractor deliver the training?

  Cognos Services provides a variety of training options including custom user training, e-Learning, and classroom. Several training aids are included with Cognos 8 BI, such as quick tours, samples, and documentation.

- What types of training will you require?

  Does your IT department have the required skills to deploy and manage Cognos 8 BI? Do users require training for report authoring?

  The information in the Cognos 8 *Architecture and Planning Guide* will help you to understand Cognos 8 BI and identify training requirements.

Index

A

administrators
  differences between Cognos Series 7 and Cognos 8 BI, 46
analysis, 42
  differences between Series 7 and Cognos 8 BI, 42
Analysis Studio
  setting up drill-through targets, 29
analysts, 44
authentication
  configuring Cognos Series 7 namespace, 10
  SaferAPIGetTrustedSignon function, 11
  single signon using Cognos Series 7 namespace, 10
  trusted signon plug-ins for Cognos Series 7, 11

B

bookmarks
  creating for drill-through access, 23
business analysts, *See* analysts
business authors
  differences between Series 7 and Cognos 8 BI, 45
business keys
  using for drill-through, 25
business managers, 44

C

Cognos 8
  publishing, 18
Cognos 8 BI
  data sources, 39
  feature differences with Series 7, 42
Cognos ReportNet
  publishing, 18
Cognos Series 7
  enabling single signon, 10
  enabling SSL, 10
  opening cubes, 20
  opening PowerPlay reports, 19
  running PowerPlay reports, 19
  trusted signon plug-ins, 11
Cognos Visualizer reports
  setting up drill through to Cognos 8, 36
consumers, 43
copyright, 2
creating
  filter expressions for drill through from Cognos Series 7 to Cognos 8, 36
  target reports for drill through from Cognos Series 7, 36
cubes
  Cognos Series 7 multilingual properties, 20
  opening Cognos Series 7, 20
  publishing, 18

D

data access
  Cognos 8 BI, 39
data sources
  Cognos 8 BI, 39
data stores
  conformed dimensions, 25
dates
  using for drill-through access, 25
defaults
  PowerPlay reports, 20
dimensions
  conformed for drill-through access, 25
disconnected users
  differeces berween Series 7 and Cognos 8 BI, 45
drill through
  setting up for Cognos Visualizer reports, 36
  setting up for PowerPlay reports, 35
drill-through
  concepts, 22
drill-through access
  between packages, 26
  between PowerCubes and packages, 25
  business keys, 25
  conformed dimensions, 25
  creating reports, 31
  debugging, 29
  defining access in packages, 26
  Drill-through Assistant, 29
  formats, 23
  members, 23
  model-based access, 22
  report-based access, 22
  setting up in packages, 26
  setting up targets in Analysis Studio, 29
  using bookmarks, 23
  using dates, 25
  using scope in model-based, 26
  using URLs, 23
  values, 23
drill-through definition, 22
  debugging, 29
  Drill-through Assistant, 29
drill-through reports
  specifying text, 33

E

Enterprise Server Administration tool
  publishing, 18
exploration, 41
  differences between Series 7 and Cognos 8 BI, 41

F

feature differences, 42
filter expressions
  creating for drill through from Cognos Series 7 to Cognos 8, 36
folders
  publishing, 18
formats
  drill-through access, 23
Framework Manager, 39
  data sources, 39

I

imported reports folder
  publishing, 18

L

levels
  member unique names, 24
linked items, 18

M

member unique names
  relational metadata, 24
members
  drill-through access, 23
metadata modelers, *See* modelers
mobile users, *See* disconnected users
model-based drill-through access
  using scope, 26
modelers
  differences between Series 7 and Cognos 8 BI

O

opening
  PowerPlay reports, 19
options
  using both Series 7 and Cognos 8, 7

P

packages
  drilling-through, 26
  setting up drill-through access, 26
PowerPlay
  changing report defaults, 20
PowerPlay reports
  setting up drill through to Cognos 8, 35
PowerPlay Web Explorer
  publishing, 18
  working with cubes, 20
PowerPlay Web Viewer
  publishing, 18
properties
  multilingual Cognos Series 7 reports and cubes, 20
publishing
  folders, 18
  to Cognos 8, 18
  to Cognos ReportNet, 18

R

recommendations
  use both Series 7 and Cognos 8, 7
report authors
  differeces berween Series 7 and Cognos 8 BI, 45
Report Studio
  creating drill-through reports, 31
reporting
  managed reporting, 40
reports
  changing PowerPlay defaults, 20
  Cognos Series 7 multilingual properties, 20
  creating drill-through access, 31
  drill-through text, 33
  imported, 18
  publishing, 18
running
  PowerPlay reports, 19

S

SaferAPIGetTrustedSignon function
  using for authentication, 11
scope
  using in drill-through access, 26
Series 7
  feature differences with Cognos 8 B, 42
setting up
  drill-through access in packages, 26
  drill-through targets in Analysis Studio, 29
single signon
  using Cognos Series 7 namespace, 10
SSL
  using Cognos Series 7 namespace, 10

T

target reports
  creating for drill through from Cognos Series 7, 36
training, 49

U

Upfront
  linked items, 18
user experiences
  differences between Series 7 and Cognos BI, 42
users
  analysts, 44
  business managers, 44
  consumers, 43
  disconnected
  training, 49

V

version of document, 2